

Donation Manual

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Getting Started

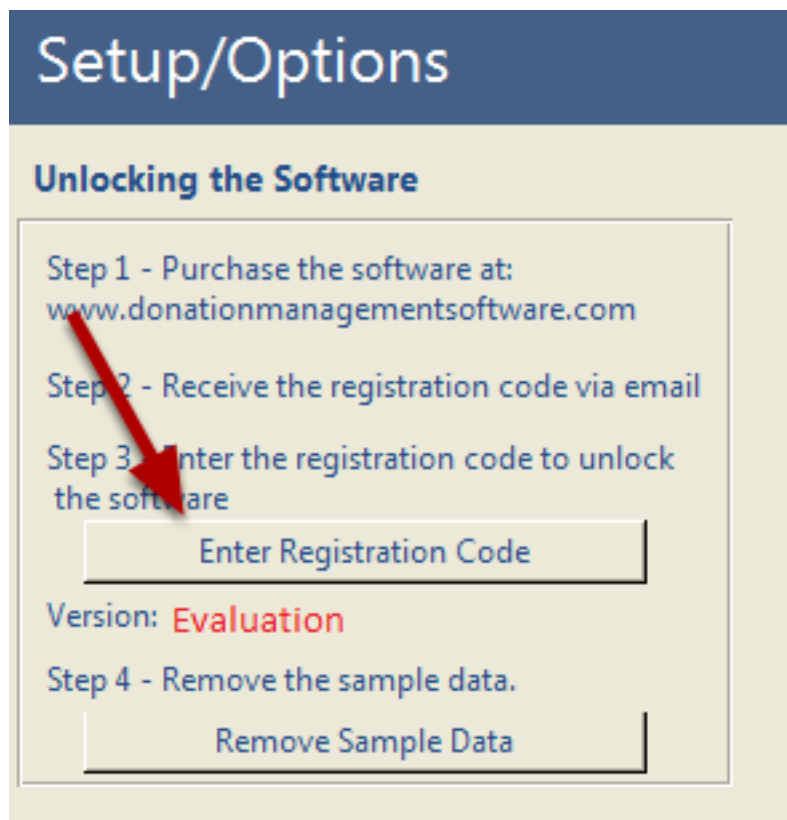
How to register software

After you purchase the software from our website you will receive an email with a registration code to unlock the evaluation software. To register the software follow these steps:

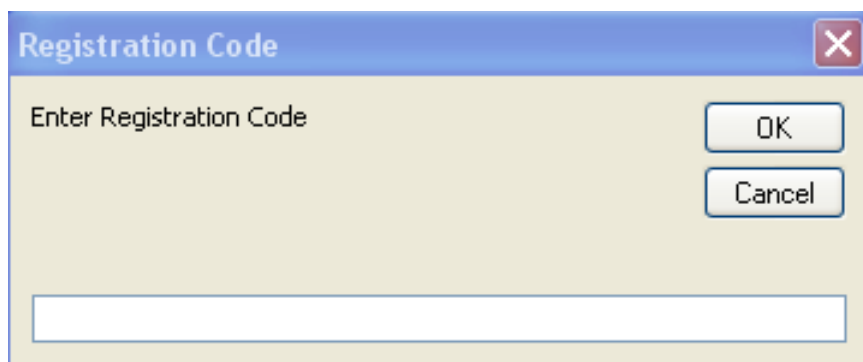
Click on Setup/Options



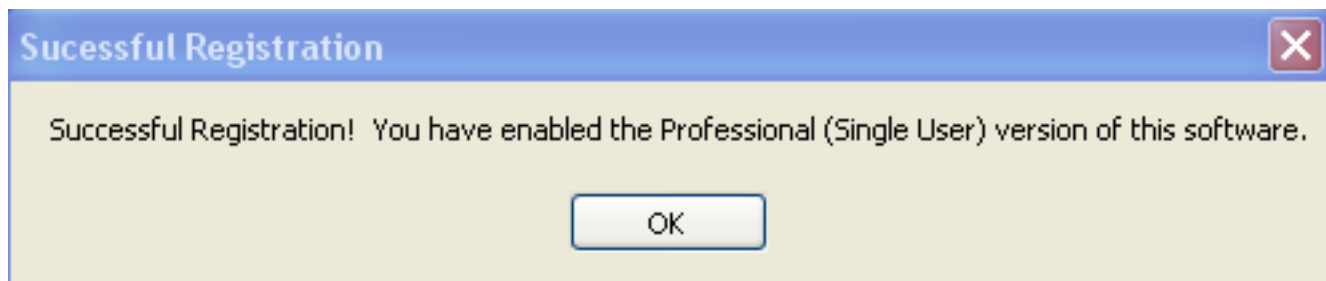
Click on the Enter Registration Code button



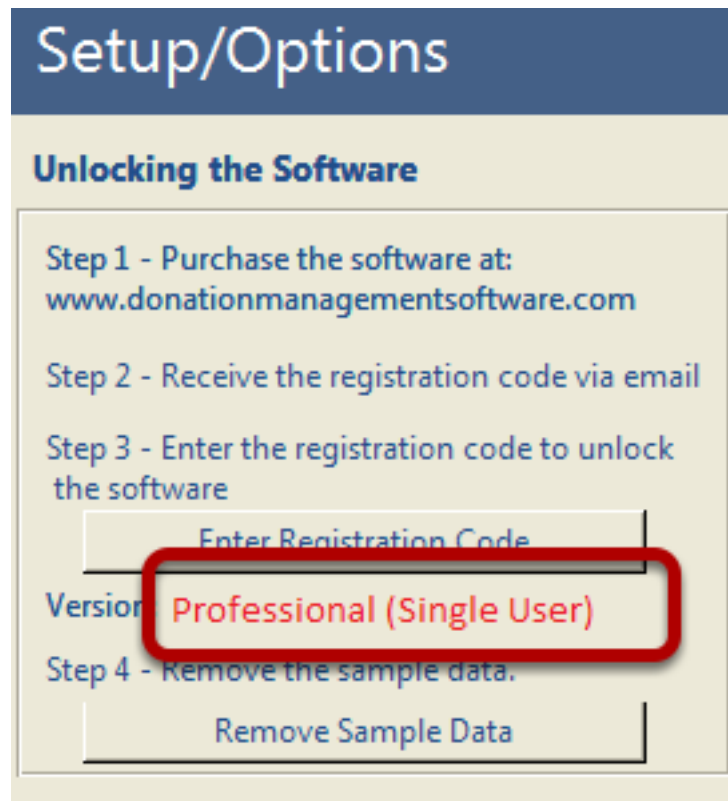
Enter your registration code



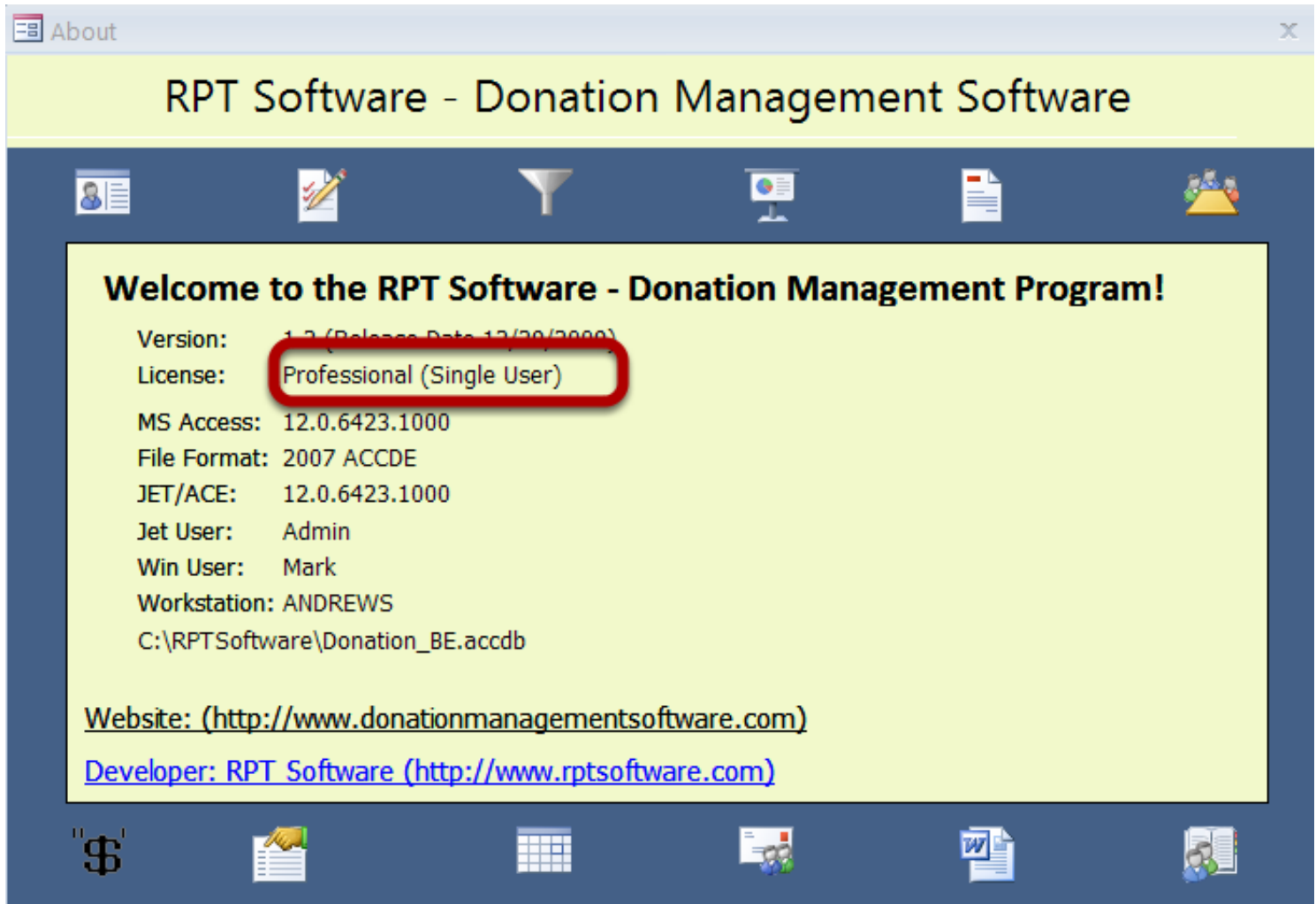
You should see this message (indicating what version you have registered)



The version of software you own will be shown on the setup/options screen



The version of software will also be shown on the info/splash screen



Ribbon

The Ribbon is the toolbar at the top of the screen. It is used to help you navigate to the various areas of the program.



List Screens

A list screen is where items are shown in a list. Numerous areas use list screens and they share some common traits. Here we will explain the contacts list screen (which has the most features):

Contacts

Help at www.donationmanagementsoftware.com

ABCDEFGHIJKLMNOPQRSTUVWXYZ#

New Contact

Show/Hide Fields

Export to Excel

Report

E-Mail

Letter

Quick Search: Search Contacts

Go

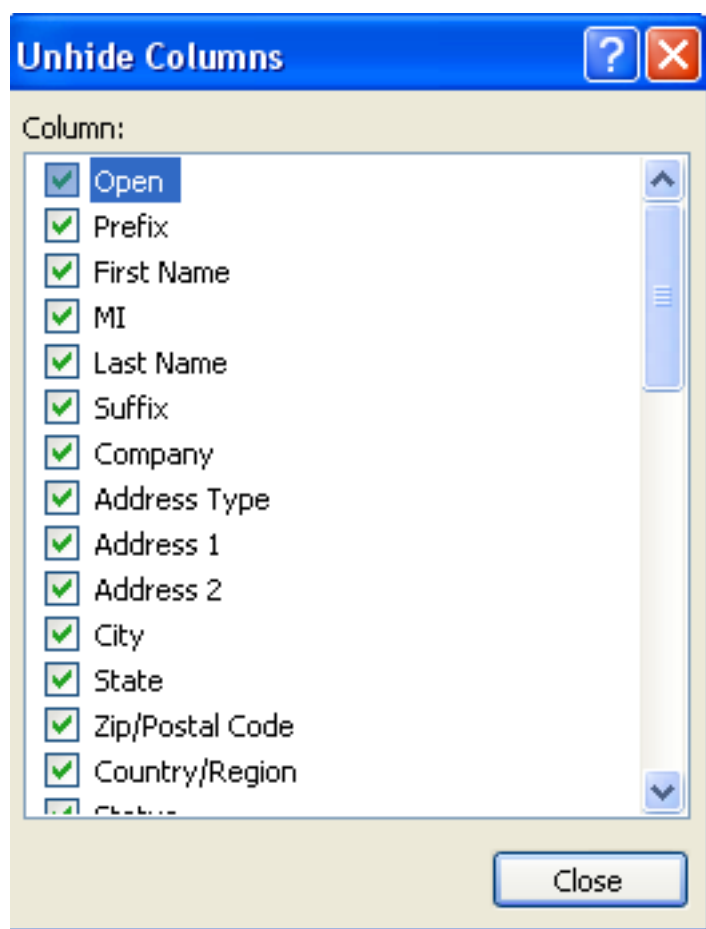
Filters

Total Records: 36

Open	Prefix	First Name	MI	Last Name	Suffix	Company	Address Type	Address 1	Address 2	City
Open	Mr.	Mark	H	Andrews		RPT Software	Business Address	318 Mosehead		Imperial
Open	Mr.	Steve		Smith		RPT Software	Home Address	123 Main Street		Ocala
Open	Mrs.	Sheryl		Salakas			Home Address	123 Main Street		Chicago
Open	Mr.	John		Smith			Home Address	123 Main Street		Los Angeles
Open	Mrs.	Leslie		Reese			Home Address	123 White Street		Savannah
Open	Mr.	Tom		Mokwa			Business Address	456 Grant St		Pittsburgh
Open		John		Tharmagal			Home Address	123 First Ave		Pittsburgh
Open	Dr.	Richard		Kimball			Business Address	789 White St		Pittsburgh
Open		Sherry		Long			Home Address	789 Second Ave		Houston
Open	Sr.	Adrian		Dumitrascu			Business Address	567 Allegheny Suite 20		Tampa
Open	Mr.	Alvin		Torre			Home Address	897 Ridge Road		Austin
Open	Mr.	Anders		Madsen			Home Address	789 White Ave		Pittsburgh
Open	Mr.	Brannon		Jones			Home Address	1792 Belmont F		Monroe
Open	Mr.	Bruno		Denuit			Home Address	1397 Paraiso Ct		Newport
Open	Mr.	Daniel		Thompson			Home Address	3385 Crestview		Everett
Open	Mr.	David		Simpson			Home Address	9687 Shakespear		Newport
Open	Ms.	Dorothy		Fox			Home Address	5452 Corte Gilb		Everett
Open	Ms.	Elly		Nkya			Home Address	5979 El Pueblo		Everett
Open	Mr.	George		Sullivan			Home Address	3238 Laguna Cir		Everett
Open	Mr.	Glenn		Trach			Home Address	7883 Mitchell C		Everett
Open	Ms.	Hannah		Arakawa			Home Address	1064 Slavio		Everett

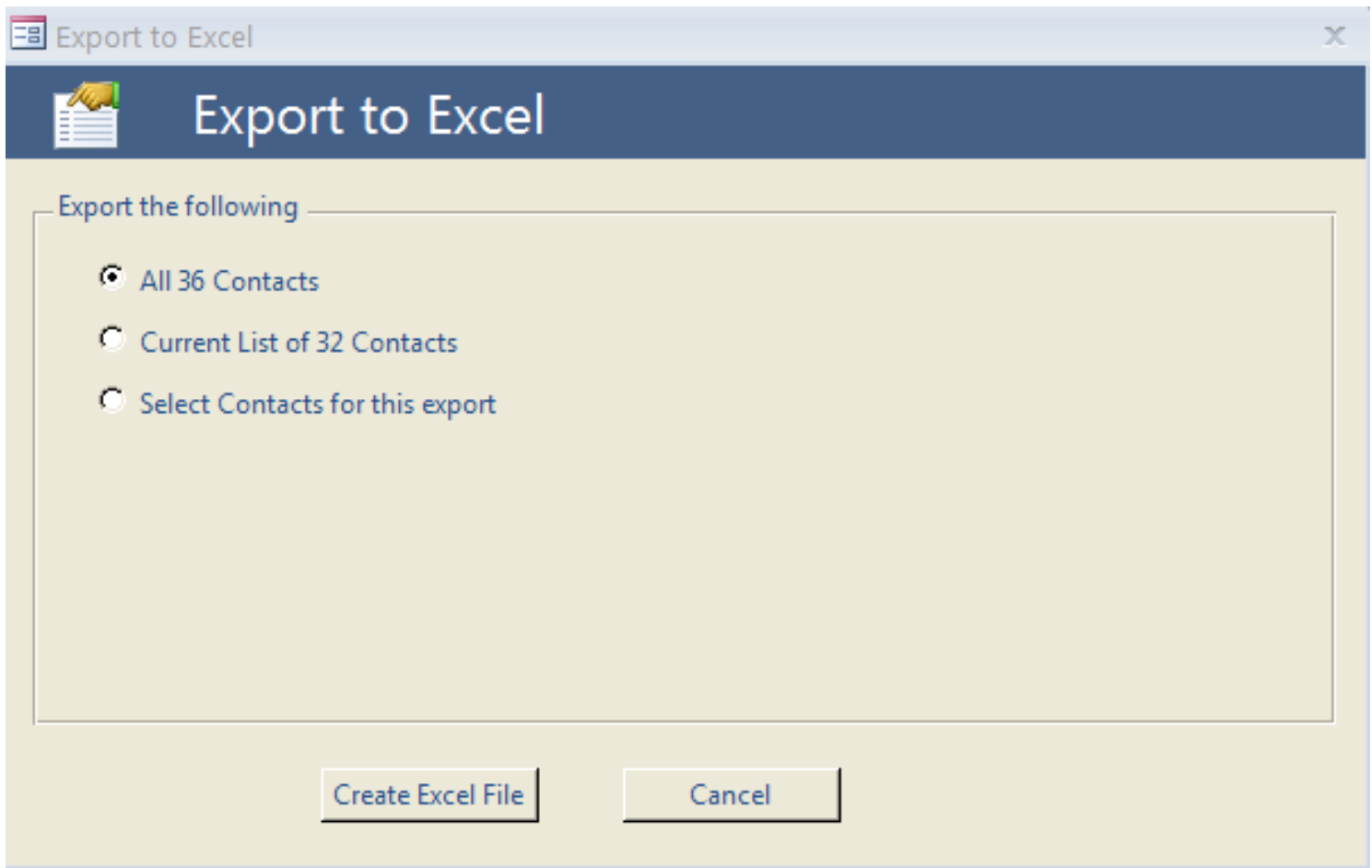
You can select New Contact to create new contact

Show/Hide Columns



Click on Show/Hide Columns brings up a screen to allow you to show/hide columns in the list

Export to Excel



Export to Excel


Export the following


- ☒ All 36 Contacts
- ☐ Current List of 32 Contacts
- ☐ Select Contacts for this export

Create Excel File Cancel

Choose "Export to Excel" to create an excel file from the entire list, the current filtered list or by selecting individual items. The excel file will in some cases have more data than what is shown on the list screen (example: The contact export show various donation summary statistics that are not on the list screen).

Report

 Reports

 Reports

Report: Contact Summary

Report Data

☐ All 36 Contacts

☐ Select Contacts for this report

☐ Use a saved filter for this report

☒ Current List of 32 Contacts

Report Sub Heading:

Create Report

Associated Contact Data to Show

☐ Activity Details

☐ Opportunity Details

☐ Donation Details

☐ Pledge Details

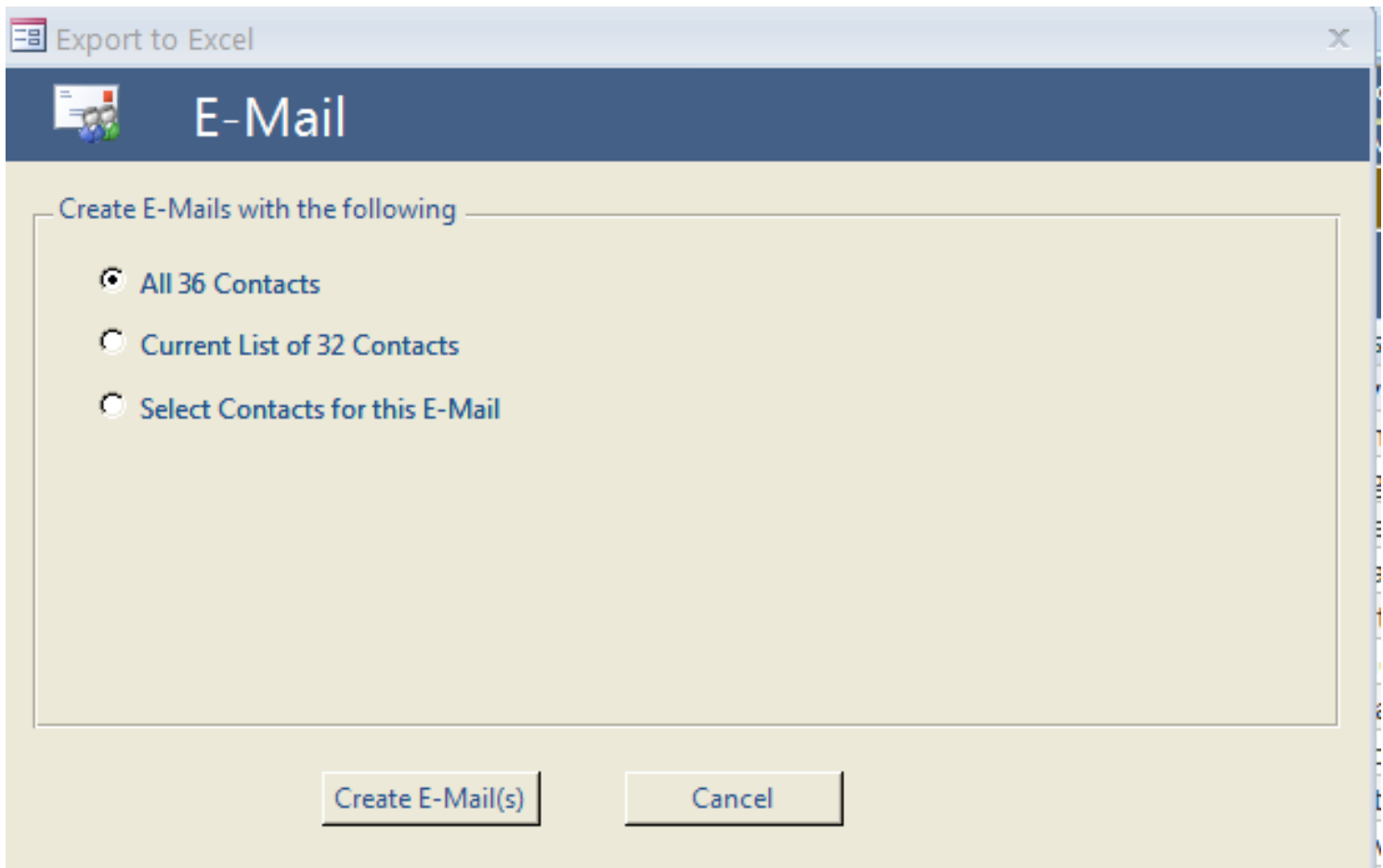
☐ Donation Summary

☐ Correspondence Details

☐ Relationships

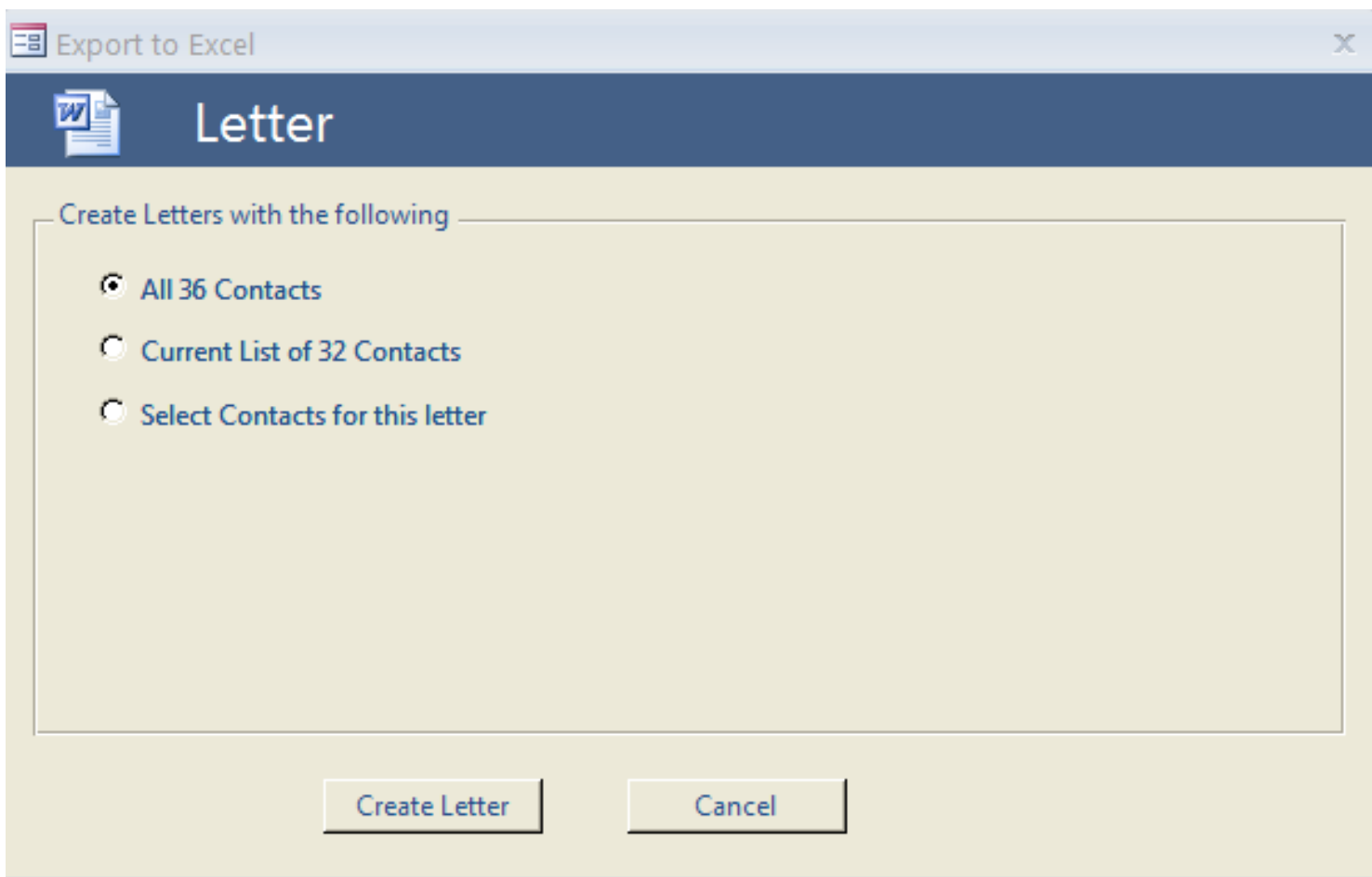
By clicking the "report" button from the contact list it brought up the report screen and by default it sets the report data to the current filtered list.

Email



By clicking the email button it lets you send emails to the entire list, the current filtered list or selected contacts. This could be one email with multiple email addresses or individual customized email templates.

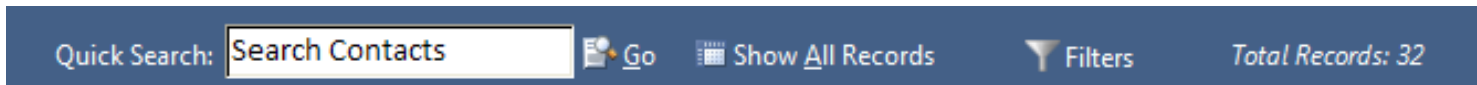
Letter



The screenshot shows a window titled "Export to Excel" with a close button in the top right corner. Below the title bar is a dark blue header with a Word document icon and the word "Letter". The main area is light beige and contains the text "Create Letters with the following" followed by three radio button options: "All 36 Contacts" (which is selected), "Current List of 32 Contacts", and "Select Contacts for this letter". At the bottom of the window are two buttons: "Create Letter" and "Cancel".

By clicking the letter button it lets you create Microsoft word documents to the entire list, the current filtered list or selected contacts.

Quick search and filters



The screenshot shows a dark blue horizontal bar. On the left, it says "Quick Search:" followed by a text input field containing "Search Contacts". To the right of the input field is a "Go" button with a magnifying glass icon. Further right is a "Show All Records" button with a calendar icon. To the right of that is a "Filters" button with a funnel icon. On the far right, it says "Total Records: 32".

This portion of the list screen allows for a

- **Quick search** (example: enter "Tom" and click Go to search for all contacts named "Tom")

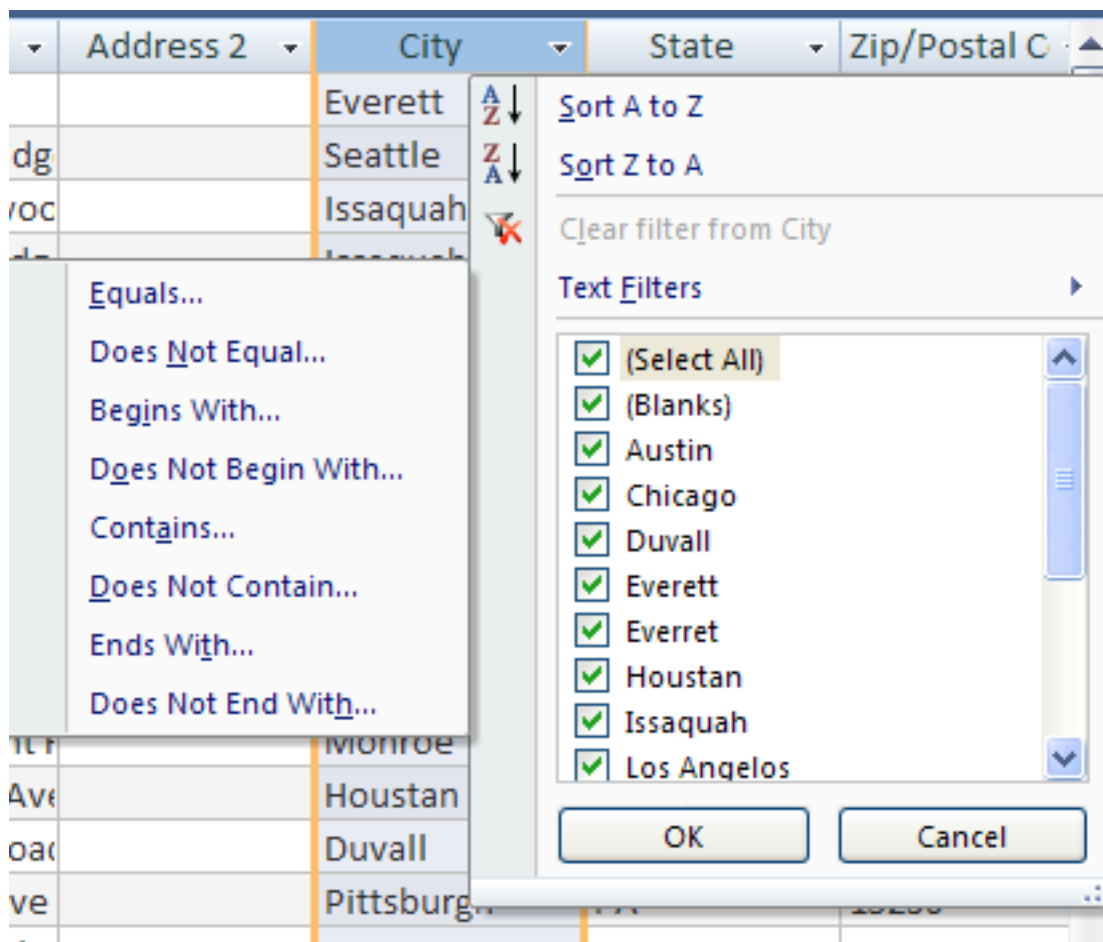
The quick search will search multiple columns (it searches appropriate columns for each list screen)

- **Show all records** will remove any filtering and show all the records

- **Filters** will bring up the filters screen to use a custom filter (see the filter section for more details)

- **Total Records: XXX** this will always display how many records you are currently viewing. If the **Show All Records** is visible you are not looking at all the records (the list has been filtered by quick search, a simple filter or an advanced filter).

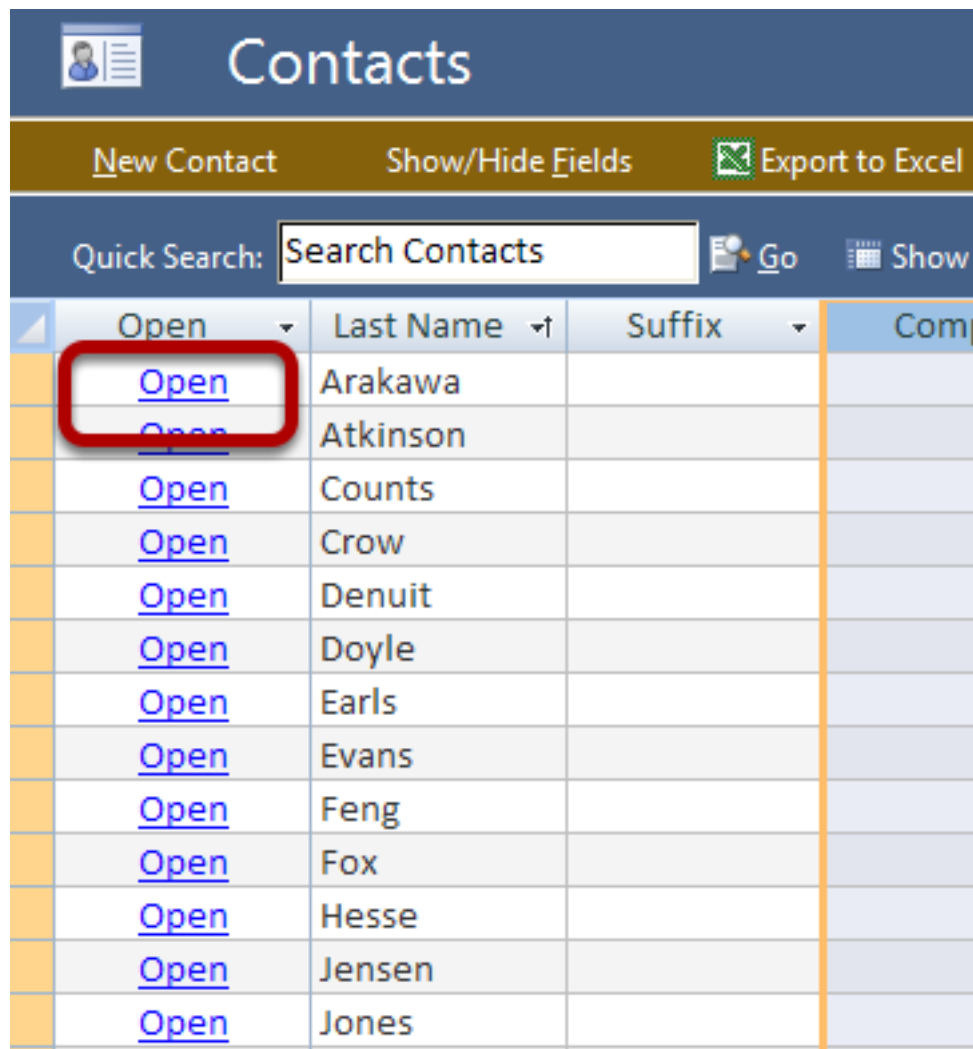
Simple Filtering and Sorting



Every column in a list screen has a little arrow on the right side of the column. By clicking that arrow you bring up the filtering and sorting options available. In this example you are filtering on **City** which is a text field and allows for sorting and text filtering (Equals..., Does Not Equal..., Begins With... etc...). Numeric and Date fields have different types of filtering capabilities. Also if there are not too many unique values you will see a check box list of items that you can select to do filtering.

Overall simple filtering is a very powerful feature to do simple analysis of your data!

Opening a list item (to show the details)



Open ▾	Last Name ▴	Suffix ▾	Com
Open	Arakawa		
Open	Atkinson		
Open	Counts		
Open	Crow		
Open	Denuit		
Open	Doyle		
Open	Earls		
Open	Evans		
Open	Feng		
Open	Fox		
Open	Hesse		
Open	Jensen		
Open	Jones		

Simply click on **Open** to open the detail screen for the selected item.

Common Elements found on screens

Here we describe some of the common elements found on most screens:

The screenshot shows a web application interface for managing contacts. The title bar at the top says 'Contact'. Below it, the main header displays 'Contact: Smith, Steve'. A navigation bar contains buttons: 'Go to' (with a dropdown arrow), 'Save and New', 'Save and Close', 'Report', 'E-mail', 'Letter', and 'Add to Mailing List'. Below the navigation bar is a tabbed interface with tabs: 'General', 'Misc', 'Activities', 'Opportunities', 'Donations', 'Pledges', 'Donation Summary', 'Correspondence', 'Notes', and 'Relationships'. The 'General' tab is active. The form is divided into several sections: 'Name' (Prefix: Mr., First Name: Steve, MI: , Last Name: Smith, Suffix:), 'Company' (RPT Software), 'Addresses' (double click to edit), 'Phone Numbers' (double click to edit), 'E-mail Addresses' (double click to edit), 'Classification' (Donor Level: 6 - Friend for the Family, Status: Active Donor, Type: Volunteer, Category: Community Group), 'Employee/Source' (Employee: Stevens, John, Source: Contacted us), 'Next Steps' (Next Step: 1 - Cultivate to Introduce, Next Step Date: 2/4/2010), and 'Groups' (Friends, Board Member). Red boxes highlight the 'Go to' dropdown, the 'Save and New' and 'Save and Close' buttons, the 'General' tab, the 'Company' field, the 'Classification' section, the 'Status' field, the 'Employee/Source' section, and the 'Next Steps' section. A red arrow points to the close button in the top right corner.

Address Type	Address	Primary
Home Address	123 Main Street, Ocala, FL 15436	Yes

Phone Type	Phone Number	Primary
Home Phone	(942) 765-1234	Yes

E-mail Type	E-mail Address	Primary
Business e-mail	steve.smith@yahoo.com	Yes

We have a few areas highlighted on this screen:

- **Go To** this is a drop down of other contacts, so you can easily jump from one contact to another by just selecting the contact you want to jump to (typing into a drop down box will help you quickly find the item if the list is long)
- **Save and New** will save the current record and start a new record
- **Save and Close** will save the current record and close the record (going back to the list screen)
- **Tabs** many screens use tabs to help show more information than can fit on one screen. Certain tabs might show related records in a list (such as "Activities", "opportunities", "Donations" and Pledges) on this screen. Other tabs might show other information.

- **Buttons with Pencil image**

There are two types of these buttons:

- a pencil by itself (such as above for "Status") will allow you to edit the drop down choices
- a pencil with a + sign (such as above for "Company") will allow you to create a new record

Example: you are adding a new contact and you want to add a new company so you can link that contact with the newly entered company.

Example: you are entering a new donation and you need to also enter the new contact that gave the donation.

- **Close "X" button** you can always close a record by clicking on the close button. Changes will still be saved (as long as you have at least the required fields for creating a new record).

Contact Management

Contact Screen

Contact General Tab

Contact: Smith, Steve

Go to Save and New Save and Close Report E-mail Letter Add to Mailing List

General Misc Activities Opportunities Donations Pledges Donation Summary Correspondence Notes Relationships

Category: Individual

Name: Prefix: Mr. First Name: Steve MI: Last Name: Smith Suffix:

Company: RPT Software

Classification

Donor Level: 8 - Founder

Status: Active Donor

Type: Board Member

Addresses (double-click to edit) Add New Address...

Address Type	Address	Primary
Home Address	123 Main Street, Ocala, FL 15436	Yes
Business Address	318 Moosehead Drive, Pittsburgh, PA 15126	No

Phone Numbers (double-click to edit) Add New Phone Number...

Phone Type	Phone Number	Primary
Home Phone	(942) 765-1234	Yes

E-mail Addresses (double-click to edit) Add New E-mail Address...

E-mail Type	E-mail Address	Primary
Business e-mail	steve.smith@yahoo.com	Yes

Employee/Source

Employee: Stevens, John

Source: Contacted us

Next Steps

Next Step: 1 - Cultivate to Introduce

Next Step Date: 2/4/2011

Groups Select Groups...

Friends, Board Member

The General Tab contains some of the most common information collected from one of your donors or contacts. A contact could be a person, a household/family or an organization. The contact is the most important entity in this software as almost everything revolves around a contact.

Data collected includes:

- category (user defined choices)

Note: when setting up contact categories you decide which type of Name entry is most appropriate for each category. For example you when you want a contact that is an organization you would want to choose the "Name" field.

- name (toggles between using (prefix, first, MI, last, suffix) and just one "Name" field, depending on Category picked.

- company

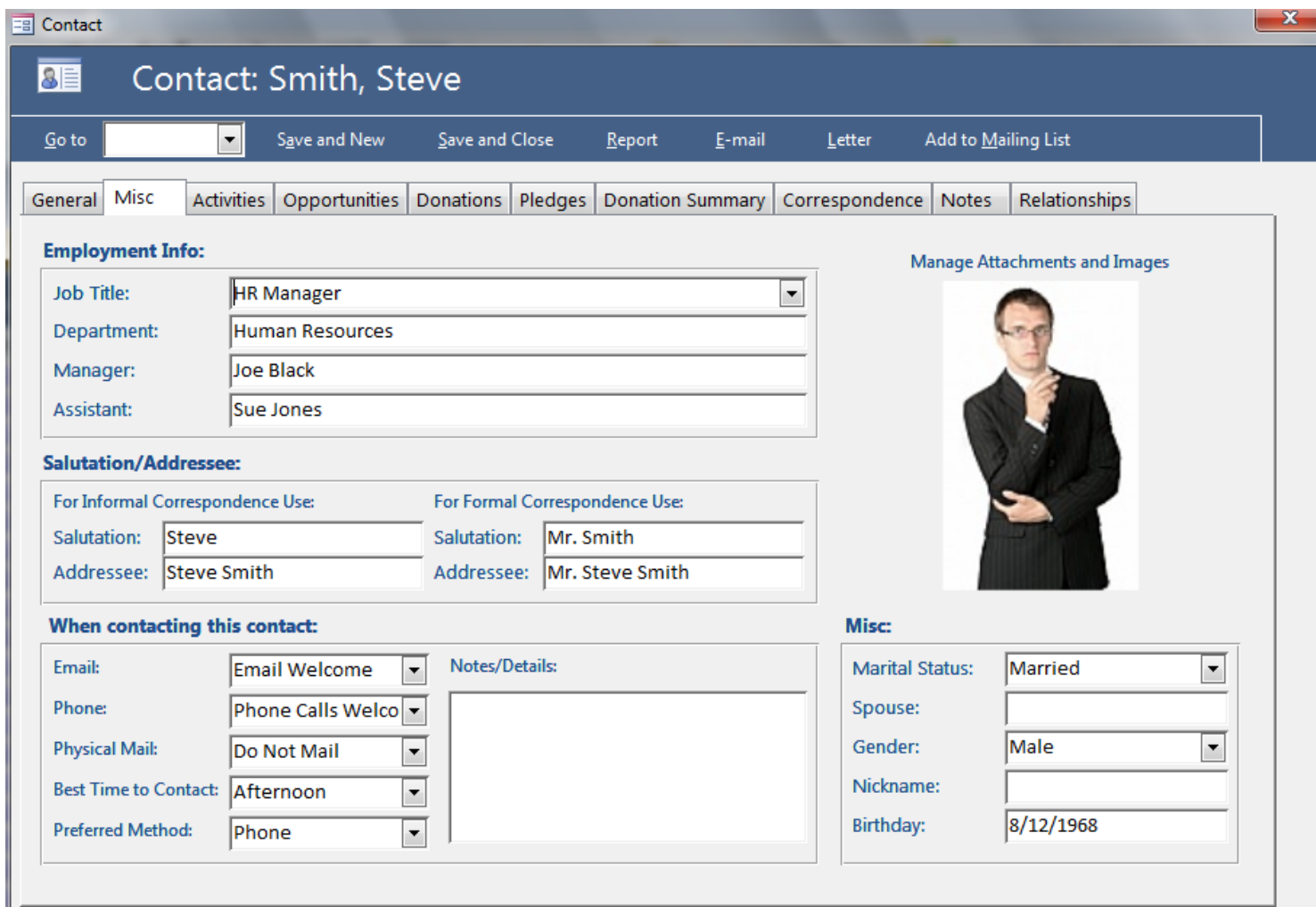
- addresses (unlimited, however only one is primary)

- phone numbers (unlimited, however only one is primary)

- email addresses (unlimited, however only one is primary)

- donor level (up to 8 user defined ranges example donating \$500 to \$1000 qualifies you for "Silver level")
- status (user defined choices)
- type (user defined choices)
- employee
- source (user defined choices)
- next step (user defined choices)
- next step date
- groups (user defined groups, select all groups that apply to this contact)

Contact Misc Tab



Contact: Smith, Steve

Go to Save and New Save and Close Report E-mail Letter Add to Mailing List

General **Misc** Activities Opportunities Donations Pledges Donation Summary Correspondence Notes Relationships

Employment Info:

Job Title: Department: Manager: Assistant:

Salutation/Addressee:

For Informal Correspondence Use: Salutation: Addressee: For Formal Correspondence Use: Salutation: Addressee:


When contacting this contact:

Email: Phone: Physical Mail: Best Time to Contact: Preferred Method: Notes/Details:

Misc:

Marital Status: Spouse: Gender: Nickname: Birthday:

Manage Attachments and Images



The Misc tab is used for various other information:

- employment info
- salutation/addressee (used in letter making)
- When contacting this contact (used to help with how you get in touch)
- picture and/or attachments
- misc other info

Contact Activities tab

[illegible]

Show related activities, you can open an existing activity or create a new activity for this contact. Sorting and filtering also available on this list.

Contact Opportunities Tab

[illegible]

Show related opportunities, you can open an existing opportunity or create a new opportunity for this contact. Sorting and filtering also available on this list.

Contact Donations Tab

Contact

Contact: Smith, Steve

Go to Save and New Save and Close Report E-mail Letter Add to Mailing List

General Misc Activities Opportunities **Donations** Pledges Donation Summary Correspondence Notes Relationships

Open	Donation Date	Donation Amount	Fund	Contact	Payment Type	Pay
Open	4/4/2007	\$500.00	Building	Smith, Steve	Check	
Open	7/3/2007	\$250.00	xxx	Smith, Steve		
Open	11/20/2007	\$300.00	Building	Smith, Steve		
Open	2/7/2008	\$400.00	xxx	Smith, Steve		
Open	5/16/2008	\$200.00		Smith, Steve		
Open	9/10/2008	\$300.00		Smith, Steve		
Open	1/8/2009	\$300.00	General	Smith, Steve		
Open	4/2/2009	\$300.00	General	Smith, Steve		
Open	11/17/2009	\$300.00	Building	Smith, Steve		
Open	12/28/2009	\$500.00	General	Smith, Steve	Check	
Open	10/4/2006	\$300.00	General	Smith, Steve		
Open	1/15/2011	\$100.00	General	Smith, Steve	Check	
Open	1/17/2011	\$777,777.00	General	Smith, Steve		
Open	3/25/2010	\$89.00	General	Smith, Steve		

Record: 1 of 14 No Filter Search

Played a role and/or have soft credits for these donation(s):

Open	Donation Date	Donation Amount	Contact Who Gave	Role	Soft Credit Amount	R
Open	12/8/2009	\$250.00	Pearson, Simon	Soft Credit	\$250.00	
Open	1/13/2010	\$300.00	Reese, Leslie	Influencer		
Open	12/9/2009	\$2,000.00	O'leary, Mark	Solicitor		
Open	7/16/2009	\$300.00	Shah, Darul	Other		

Record: 1 of 5 No Filter Search

Show related donation, you can open an existing donation or create a new donation for this contact. Sorting and filtering also available on this list.

A second list shows "soft credits" or examples of where this contact was not the primary contact who gave the donation but played a role in helping to get the donation.

Contact Pledges Tab

Contact: Smith, Steve

Go to Save and New Save and Close Report E-mail Letter Add to Mailing List

General Misc Activities Opportunities Donations **Pledges** Donation Summary Correspondence Notes Relationships

Open	Pledge Date	Pledge Amount	Status	Campaign	Event	Contact	Employ
Open	12/15/2009	\$500.00	Complete	Campaign to Save		Smith, Steve	
* (New)						Smith, Steve	

Show related pledges, you can open an existing pledge or create a new pledge for this contact. Sorting and filtering also available on this list.

Contact Donation Summary

Contact: Smith, Steve

Go to Save and New Save and Close Report E-mail Letter Add to Mailing List

General Misc Activities Opportunities Donations Pledges **Donation Summary** Correspondence Notes Relationships

Donation Summary:

\$4,350 collected (13 Donations)

First Donation on 10/04/2006

Last Donation on 01/15/2011

Smallest Donation Amount: \$100

Largest Donation Amount: \$600

Pledge Summary:

Total Pledged: \$500

Donations to fulfill pledges: \$500

ALL Pledges have been satisfied!

Donation Summary Graph (Last 10 Years):

Year	Total Donations
2006	\$300
2007	\$1,050
2008	\$900
2009	\$1,400
2010	\$600
2011	\$100

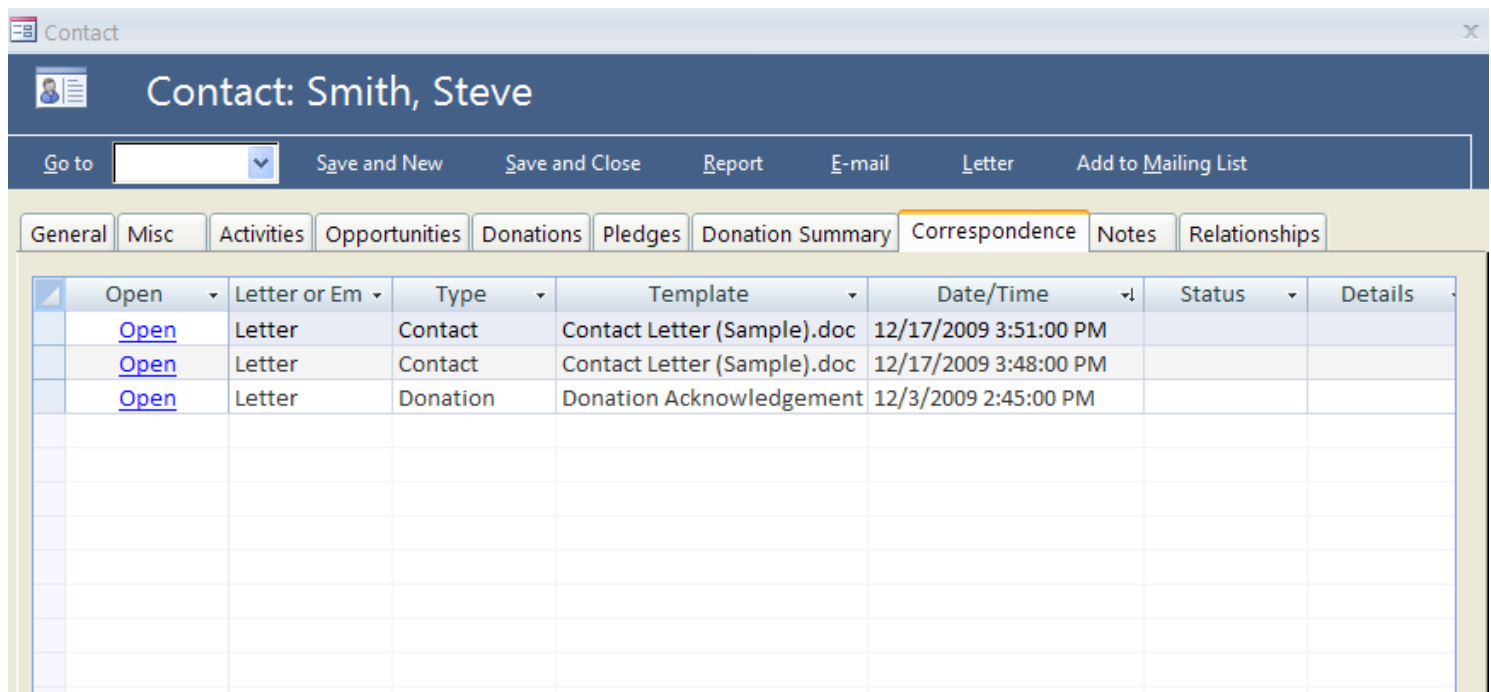
Donation Summary Detail (Last 10 Years):

Year	Total Donations
2006	\$300
2007	\$1,050
2008	\$900
2009	\$1,400
2010	\$600
2011	\$100

Record: 1 of 6 No Filter Search

Summarizes the donations and pledges made by this contact.

Contact Correspondence Tab

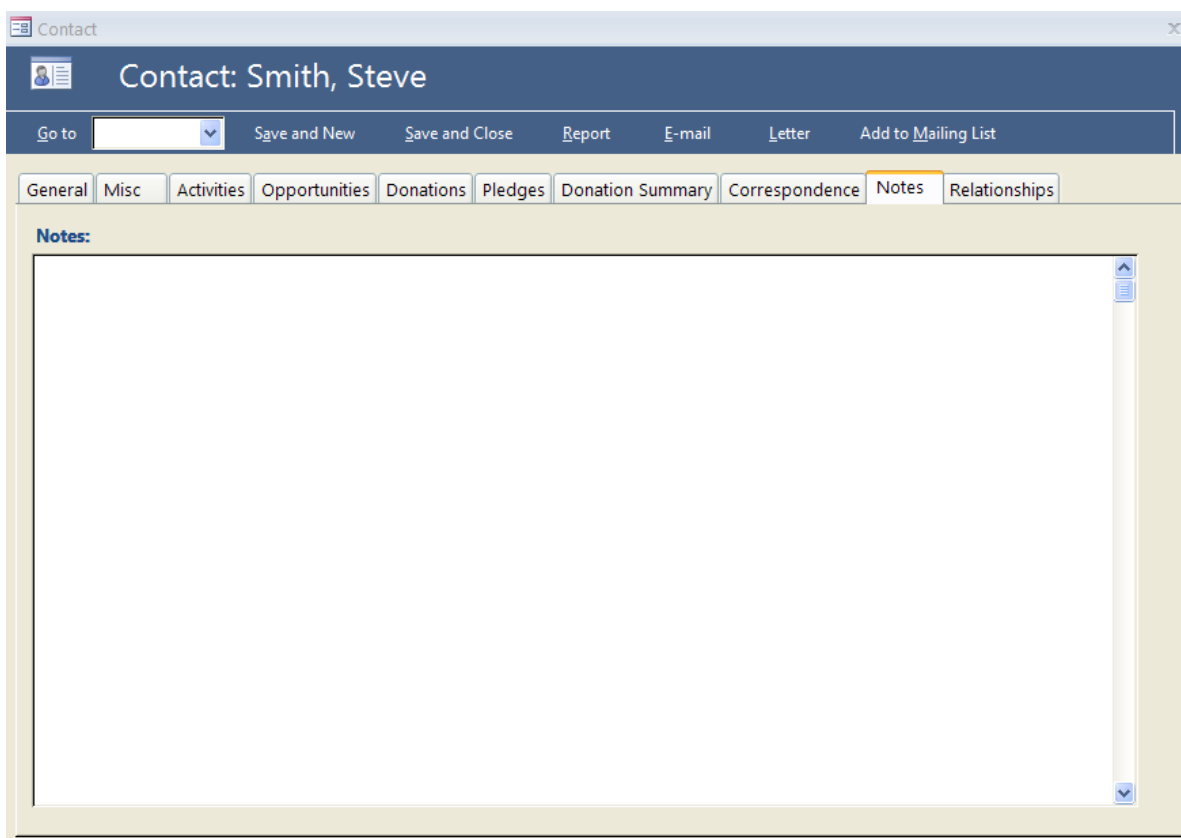


The screenshot shows the 'Contact: Smith, Steve' window with the 'Correspondence' tab selected. The window has a title bar 'Contact' and a close button. Below the title bar is a header bar with a contact icon and the name 'Contact: Smith, Steve'. Below the header bar is a toolbar with buttons: 'Go to' (with a dropdown), 'Save and New', 'Save and Close', 'Report', 'E-mail', 'Letter', and 'Add to Mailing List'. Below the toolbar is a tab bar with tabs: 'General', 'Misc', 'Activities', 'Opportunities', 'Donations', 'Pledges', 'Donation Summary', 'Correspondence' (selected), 'Notes', and 'Relationships'. Below the tab bar is a table with columns: 'Open', 'Letter or Em', 'Type', 'Template', 'Date/Time', 'Status', and 'Details'. The table contains three rows of data.

Open	Letter or Em	Type	Template	Date/Time	Status	Details
Open	Letter	Contact	Contact Letter (Sample).doc	12/17/2009 3:51:00 PM		
Open	Letter	Contact	Contact Letter (Sample).doc	12/17/2009 3:48:00 PM		
Open	Letter	Donation	Donation Acknowledgement	12/3/2009 2:45:00 PM		

Shows related correspondence. See the Email or Letter sections to learn more about correspondence.

Contact Notes Tab



The screenshot shows the 'Contact: Smith, Steve' window with the 'Notes' tab selected. The window has a title bar 'Contact' and a close button. Below the title bar is a header bar with a contact icon and the name 'Contact: Smith, Steve'. Below the header bar is a toolbar with buttons: 'Go to' (with a dropdown), 'Save and New', 'Save and Close', 'Report', 'E-mail', 'Letter', and 'Add to Mailing List'. Below the toolbar is a tab bar with tabs: 'General', 'Misc', 'Activities', 'Opportunities', 'Donations', 'Pledges', 'Donation Summary', 'Correspondence', 'Notes' (selected), and 'Relationships'. Below the tab bar is a large text area for notes, labeled 'Notes:'.

Just a big area for notes about this contact. If you need chronological notes you can use activities.

Contact Relationships Tab

Contact: Smith, Steve

Go to Save and New Save and Close Report E-mail Letter Add to Mailing List

General Misc Activities Opportunities Donations Pledges Donation Summary Correspondence Notes **Relationships**

Work Relationships Add New Work Relationship...

Andrews, Mark	Coworker	Edit...	Delete...
-------------------------------	----------	---------	-----------

Family Relationships Add New Family Relationship...


Smith, John	Brother	Edit...	Delete...
Smith, Leslie	Daughter	Edit...	Delete...


Other Relationships Add New Other Relationship...

Atkinson, Teresa	Team Member	Edit...	Delete...
----------------------------------	-------------	---------	-----------


Use this tab to add all the relationships this contact has to other contacts. Relationships are split into three basic types (work, family and other). Once you add a relationship you can easily jump around to other contacts by clicking the hyperlinks. For example if you clicked on [Smith, Leslie](#) you would jump to Leslie's information and would see [Smith, John](#) listed as her father.

Contact Donor Levels

 Donor Levels ✕




Donor Levels

Number of Donor Levels: 

Donor Level Name:	From:	To:
<input type="text" value="1 - Friend"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$99.99"/>
<input type="text" value="2 - Supporter"/>	<input type="text" value="\$100.00"/>	<input type="text" value="\$249.99"/>
<input type="text" value="3 - Patron"/>	<input type="text" value="\$250.00"/>	<input type="text" value="\$499.99"/>
<input type="text" value="4 - Citizen"/>	<input type="text" value="\$500.00"/>	<input type="text" value="\$999.99"/>
<input type="text" value="5 - Associate"/>	<input type="text" value="\$1,000.00"/>	<input type="text" value="\$2,499.99"/>
<input type="text" value="6 - Friend for the Family"/>	<input type="text" value="\$2,500.00"/>	<input type="text" value="\$4,999.99"/>
<input type="text" value="7 - Stewart"/>	<input type="text" value="\$5,000.00"/>	<input type="text" value="\$9,999.99"/>
<input type="text" value="8 - Founder"/>	<input type="text" value="\$10,000.00"/>	<input type="text" value="\$999,999,999.99"/>

You have full control over the donor levels defined.

Contact Relationship screen



The screenshot shows a window titled "Contact Relationship" with a close button (X) in the top right corner. The window has a dark blue header bar with the title "Contact Relationship". Below the header, the "Relationship Type:" section contains three radio buttons: "Work Relationship", "Family Relationship" (which is selected and has a dotted border), and "Other Relationship". The "Contacts:" section features two rows of dropdown menus. The first row shows "Smith, Steve" followed by "is" and "Husband". The second row shows "Smith, Sue" followed by "is" and "Wife". To the right of these dropdowns is a small icon of a pencil and eraser. The "Soft Credit:" section has two checked checkboxes with text: "[Smith, Steve] receives soft credit on any donations made by [Smith, Sue]" and "[Smith, Sue] receives soft credit on any donations made by [Smith, Steve]". Below this is a "Relationship Notes:" label followed by a large empty text area. At the bottom center is an "OK" button.

Contact Relationship

Relationship Type:

- ☐ Work Relationship
- ☒ Family Relationship
- ☐ Other Relationship

Contacts:

Smith, Steve is Husband

Smith, Sue is Wife

Soft Credit:


- ☒ [Smith, Steve] receives soft credit on any donations made by [Smith, Sue]
- ☒ [Smith, Sue] receives soft credit on any donations made by [Smith, Steve]

Relationship Notes:

OK

Example of setting up a relationship. In version 2.0 we added the option to specify that the people in the relationship receive automatic "soft credit" on donations. So in this example if "Steve Smith" gave a donation of \$500 his wife "Sue Smith" would automatically be added as a soft credit on that \$500 donation. See the donation screen for more details.

Contact Duplicate Detection



Similar Contacts

The following contacts have similar addresses.

Please be sure you are not entering a duplicate contact.

Name:

Address 1:

City/State/Zip:

When entering contact addresses if you enter an address that is similar to another contact you will see this screen popup showing you a list of other contact(s) that have similar addresses. This is just to help eliminate duplicate contact entry into the system.

Donations and Pledges

Donation Screen

The screenshot shows a software window titled "Donation" with a blue header bar. On the left of the header is a dollar sign icon and the word "Donation". On the right, it displays "Batch Name: 2010-05-20hhh" and "Posted/Locked: No". Below the header is a navigation bar with buttons: "Go to" (with a dropdown), "Save and New", "Save and Close", "Report", "E-mail", "Letter", and "Add to Mailing List".

Below the navigation bar are two tabs: "General" (selected) and "Other People Involved".

The "General" tab contains several sections:

- Donation Information:** Fields for "Donation Date" (12/28/2009), "Donation Amount" (\$500.00), "Donation Type" (Individual Contributions), and "Fund" (General). Each field has a dropdown menu and a small edit icon.
- Contact:** A dropdown menu showing "Smith, Steve" with an edit icon.
- Appeal:** A dropdown menu showing "Received a general mailing" with an edit icon.
- Payment Type:** A dropdown menu showing "Check" with an edit icon.
- Payment Details:** A text field containing "456".

Below these fields are two more sections:

- Campaign, Event and/or Pledge:** A red banner reads "Pledges available for this contact". Fields include "Campaign" (Campaign to Save the Church), "Event" (empty), and "Related Pledge" (12/15/2009 - Smith, Steve - \$500.00). Each has an edit icon.
- Other Info:** Fields for "In Honor Of:", "In Memory Of:", and "Anonymous:" (No).

Below these are two more sections:

- Correspondence/Acknowledgement:** Includes a "Help on Correspondence" link. Fields for "Correspondence:" (Sent an acknowledgement letter), "Correspondence Date:" (12/30/2009), and "Acknowledged:" (Yes). Below is a section "Letters/Email sent for this donation (double-click to view):" with a table header: "Type", "Template", "Date/Time".
- Matching Donation:** Includes a "Remove matching donation...." link. A dropdown menu shows "\$500.00 from acme corp".

At the bottom right is a "Receipt" section with a "Help on Receipts" link. It contains fields for "Receipt Amount:" (\$500.00) and "Receipt #:" (016). Below this is a "Notes" section with a large text area.

The donation screen is used to enter donations or pledge payments. It consists of the following information:

- donation date
- donation amount
- donation type (user defined list of choices)
- fund (user defined list of funds)
- campaign (if the donation was related to a certain campaign)
- event (if the donation was related to a certain event)
- related pledge (if the donation was a payment towards a previous pledge, only pledges for the current contact are shown to choose from)
- correspondence
- correspondence date
- acknowledged (when a correspondence is made this becomes "Yes")

Note: there are a few ways to do correspondence:

1. manual correspondence:

- you just specify how you did the correspondence and the date using the two fields shown and then outside of this program you send the letter, make the phone call, send the email etc...

2. Letters

- You can press the Letter button at the top of the screen to do a letter for this donation. If you choose to record the correspondence after the letter is generated it records the history of this correspondence and shows the details in the list box at the bottom left of the screen. It will also show the correspondence on the contact's detail screen (since you generated an acknowledgment letter for this donation and for this contact). See the letters section for more details.

3. Email

- You can press the Email button at the top of the screen to do an email for this donation. If you choose to record the correspondence after the email is generated it records the history of this correspondence and shows the details in the list box at the bottom left of the screen. It will also show the correspondence on the contact's detail screen (since you generated an acknowledgment email for this donation and for this contact). See the email section for more details.

You can also choose to add this donation to a **mailing list** and handle the correspondence at a later time. Example: you send out donation acknowledgments on Friday of every week.

- contact
- appeal (user defined list of choices for what caused the contact to make this donation)
- employee
- payment type (user define list of choices)
- payment details

- in honor of
- in memory of
- anonymous

- matching donation (added in version 2.0), used to specify that a matching donation was given for this donation. When a matching donation is added a pledge is added to the system (indicating that this donation should be collected). So in the example above Steve Smith gave \$500 and acme corp matched that \$500 donation. so a pledge for \$500 for acme corp was created. The actual \$500 donation from acme corp is added as a seperate donation to fulfill the pledge of \$500.

- receipt amount (automatically defaults to the amount of the donation but could be changed to be a lesser amount)
Example: \$100 donation but contact attends a dinner valued at \$20 so the tax deductible receipt amount is \$80
- receipt number (automatically generated)

- notes (general notes about this donation)

Pressing **Report** will generate a donation summary report for this donation (for easy printing of the donation details).

You can add a donation from various places throughout the program (donation list screen, contacts screen, pledge screen, campaign screen, event screen)

[illegible]

The second tab on the donation screen is used to specify other people involved in the donation.

- employee who solicited this donation
 - Other contacts involved in getting this donation (soft credits or people who played other roles)
- This is used to specify and track other people who helped get this donation along with a soft credit amount. Soft credit amounts must be equal to or less than the donation amount, however multiple people can be involved and receive soft credits. On the contact screen when you setup relationships you can specify rules for soft credits so that soft credits get automatically assigned.

Batch Donations

Donations (Batch View) - Donation Management Software

Home

Contacts Activities Donations Pledges Campaigns Events Opportunities Companies Invoices Employees Reports E-Mail Letters Setup/Options Filters Monday, Jan 17, 2011 Info

Donations (Batch View) Switch to Donation View

New Batch Show/Hide Fields Export to Excel

Quick Search: Search Batches Go Total Records: 2

Open	BatchName	Number Of Donations	Total Donation Amount	Batch Initial	Batch Date	Batch Posted	Notes
Open	2010-05-20hhh	45	\$29,650.00	hhh	5/20/2010	No	
Open	2011-01-14mha	3	\$225.00	mha	1/14/2011	Yes	

From the Donations List you can click a button at the top of the list to toggle between "Donations" and "Donations (Batch View)". The "Donations" lists shows individual donations and the "Donations (Batch View)" shows batches of donations. For example: a batch could be made of 50 donations that were all collected in the same week. Let's walk through creating a new batch and see the benefits of creating batches of donations. Note: Using batches is completely optional.

Batch Settings

\$

Batch Settings

Batch Information

Batch Date:1/17/2011

Initials:abc

Batch Name2011-01-17abc

Notes:

Defaults to use when entering donations in this batch

Employee:Stevens, John

Campaign:Campaign to Save the Church

Event:

Appeal:

Correspondence:Sent an acknowledgement letter

Correspondence Date:1/17/2011

Add to Mail List:Donation Acknowledgement

OK

Help on Batches

After you click the "New Batch" button it takes you to the batch settings screen. This screen is used to setup the batch name and the defaults to use when entering donations. The defaults help make data entry faster and easier.

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Batch of Donations

"\$" Batch: 2010-05-20hhh Delete Batch

Go to Save and Close Batch Settings Post Batch Add to Batch Export Batch to Excel or Quickbooks

Donation (Enter donation information and click the Enter button. Repeat process to enter all donations for this batch.)

Contact: Payment Type:

Donation Amount: Payment Details:

Donation Date: Receipt Amount:

Donation Type: Notes:

Fund:

Related Pledge:

Enter Clear Fields

Donations for this Batch (Enter additional details here if needed, or open donation to view/edit details.)

	Open	Remove	Donation Date	Donation Amount	Donation Type	Fund	Contact
	Open	Remove	4/4/2007	\$500.00	dual Contributions	Building	Smith, Steve
	Open	Remove	7/3/2007	\$250.00	dual Contributions	Building	Smith, Steve
	Open	Remove	11/20/2007	\$300.00	Pledge Payment	Building	Smith, Steve
	Open	Remove	2/7/2008	\$400.00	rate Contributions	Building	Smith, Steve
	Open	Remove	5/16/2008	\$200.00	Pledge Payment	General	Smith, Steve
	Open	Remove	9/10/2008	\$300.00		General	Smith, Steve
	Open	Remove	1/8/2009	\$300.00		General	Smith, Steve
	Open	Remove	4/2/2009	\$300.00	dual Contributions	General	Smith, Steve
	Open	Remove	7/16/2009	\$300.00		General	Shah, Parul
	Open	Remove	11/17/2009	\$300.00		Building	Smith, Steve
	Open	Remove	12/8/2009	\$250.00	dual Contributions	General	Pearson, Simon
	Open	Remove	1/13/2010	\$300.00	dual Contributions	Building	Reese, Leslie
	Open	Remove	12/9/2009	\$2,000.00	rate Contributions	Building	O'leary, Mark

Record: 1 of 45 No Filter

Number Of Donations: 45 Total Donation Amount: \$29,650.00 [Help on Batches](#)

Once you have entered all donations for the batch you will see the donations all listed on the bottom half of the screen, you can now do the following:

- click **Open** on any individual donation to open it for viewing/modifications
- click **Remove** on any individual donation to remove it from the batch (Note: this does not delete the donation it just removes it's association with this current batch)
- click **Batch Settings** to adjust the defaults used by the batch (this will then change details of what happens when new donations are entered)
- click **Post Batch** to lock the batch (see below of screenshot after Posting Batch)
- click **Add to Batch** to add individual donations that already exist and are not currently in a batch, to the existing batch. Note: a donation can only be in ONE batch.
- click **Export Batch to Excel or Quickbooks** to export the batch to an Excel spreadsheet or a Quickbook iif file (see the section on Quickbooks for more detailed info on how the Quickbooks integration works).

Batch of Donations

"\$" Batch: 2010-05-20hhh Delete Batch

Go to Save and Close Batch Settings UnPost Batch Add to Batch Export Batch to Excel or Quickbooks

Donation (Enter donation information and click the Enter button. Repeat process to enter all donations for this batch.)

Batch is Posted (Locked)
Click "UnPost Batch" to unlock this batch for editing

Donations for this Batch (Enter additional details here if needed, or open donation to view/edit details.)

	Open	Remove	Donation Date	Donation Amount	Donation Type	Fund	Contact
	Open	Remove	4/4/2007	\$500.00	dual Contributions	Building	Smith, Steve
	Open	Remove	7/3/2007	\$250.00	dual Contributions	Building	Smith, Steve
	Open	Remove	11/20/2007	\$300.00	Pledge Payment	Building	Smith, Steve
	Open	Remove	2/7/2008	\$400.00	rate Contributions	Building	Smith, Steve
	Open	Remove	5/16/2008	\$200.00	Pledge Payment	General	Smith, Steve
	Open	Remove	9/10/2008	\$300.00		General	Smith, Steve
	Open	Remove	1/8/2009	\$300.00		General	Smith, Steve
	Open	Remove	4/2/2009	\$300.00	dual Contributions	General	Smith, Steve
	Open	Remove	7/16/2009	\$300.00		General	Shah, Parul
	Open	Remove	11/17/2009	\$300.00		Building	Smith, Steve
	Open	Remove	12/8/2009	\$250.00	dual Contributions	General	Pearson, Simon
	Open	Remove	1/13/2010	\$300.00	dual Contributions	Building	Reese, Leslie
	Open	Remove	12/9/2009	\$2,000.00	rate Contributions	Building	O'leary, Mark

Record: 4 of 45 No Filter Search

Number Of Donations: 45 Total Donation Amount: \$29,650.00 Help on Batches

Once a batch is Posted the batch screen changes so that no additional donations can be added. Also each individual donation now becomes locked so that the critical information on the donation cannot be changed. So in this example if you opened any of the 45 individual donations that makeup this batch you would see that you cannot make changes to any of these donations. At the top of the donation screen it will show the batchname and whether it has been posted/locked. It's a good idea to post batches of donations

Donation

Batch Name: 2010-05-20hhh
Posted/Locked: Yes

Go to Save and New Save and Close Report E-mail Letter Add to Mailing List

General Other People Involved

Donation Date: 7/3/2007 Contact: Smith, Steve
 Donation Amount: \$250.00 Appeal:
 Donation Type: Individual Contributions Payment Type:
 Fund: Building Payment Details:

Campaign, Event and/or Pledge *Pledges available for this contact* **Other Info**

Campaign: In Honor Of:
 Event: In Memory Of:
 Related Pledge: Anonymous: No

Correspondence/Acknowledgement [Help on Correspondence](#) **Matching Donation** [Add a matching donation....](#)

Correspondence: Sent an acknowledgement letter
 Correspondence Date: 7/13/2007 Acknowledged: Yes
 Letters/Email sent for this donation (double-click to view):

Type	Template	Date/Time

Receipt [Help on Receipts](#)

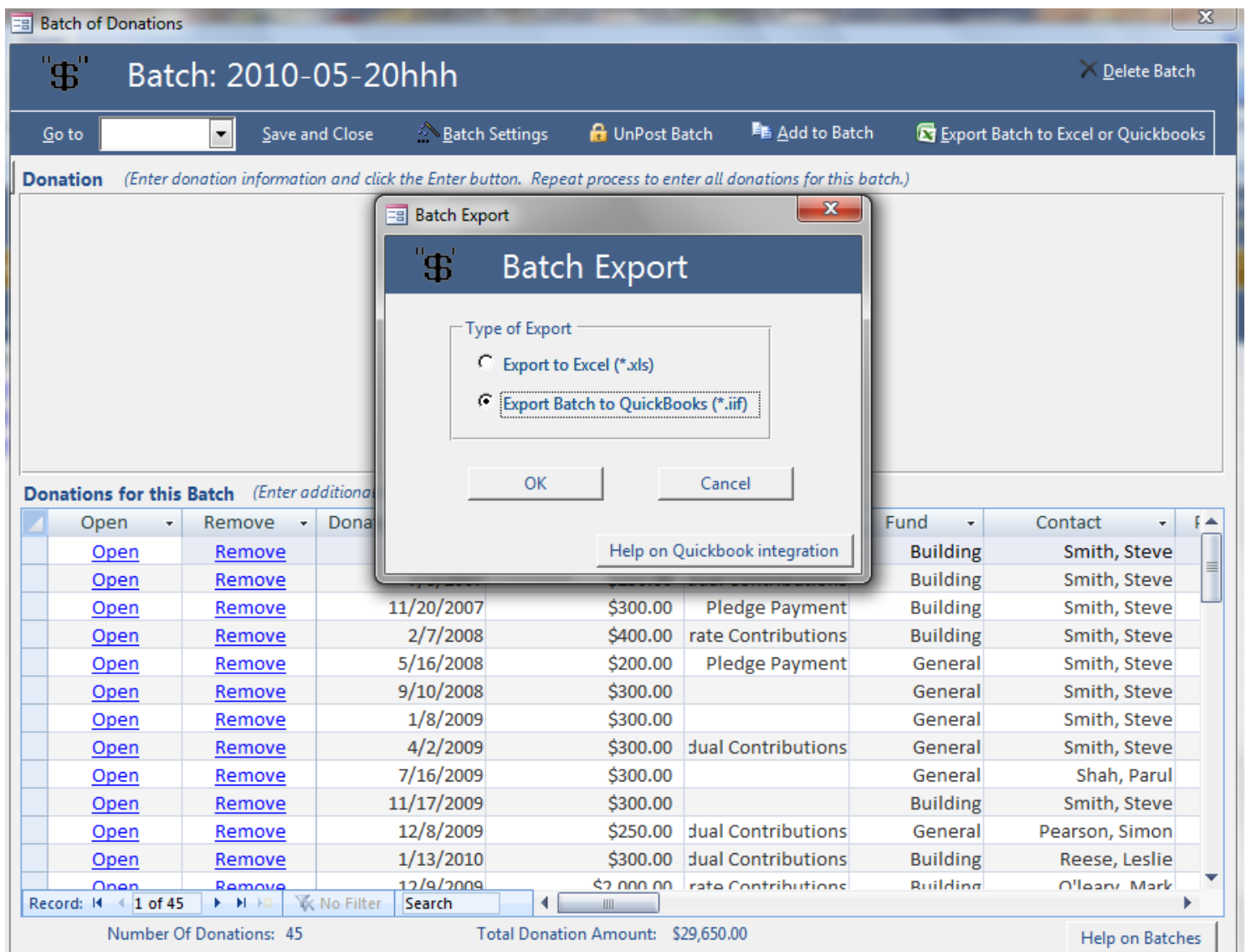
Receipt Amount: \$33.00 Receipt #: 002

Notes

Here is an example of opening a donation that is in a batch that has been posted/locked. The critical fields such as dates, amounts, funds and contact are locked down so they can't be changed. The batch name shows at the top of the donation.

Note: when trying to change information on any list of donations this same type of lockdown is also in effect. Example: the donation list on the contact screen, campaign screen, event screen or main donation list if you try and adjust the donation amount you will not be able to make the change.

QuickBooks Integration



You have the ability to export a batch of donations to Quickbooks by clicking on **Export Batch to Excel or Quickbooks** and choosing **Export Batch to QuickBooks (*.iif)**. After pressing OK and supplying your filename an **iif** file will be created. The iif file can easily be imported into Quickbooks by selecting File/Utilities/Import/IIF Files... and choosing this newly created file.

We recommend you test out importing into Quickbooks with a small batch of a few donations.

After the file has been imported into Quickbooks, you'll be able to see any new contacts in the Quickbooks customers page. All the donations that you just imported will be in Undeposited Funds. You'll need to make a deposit according to your bank statement, and then reconcile as you normally do.

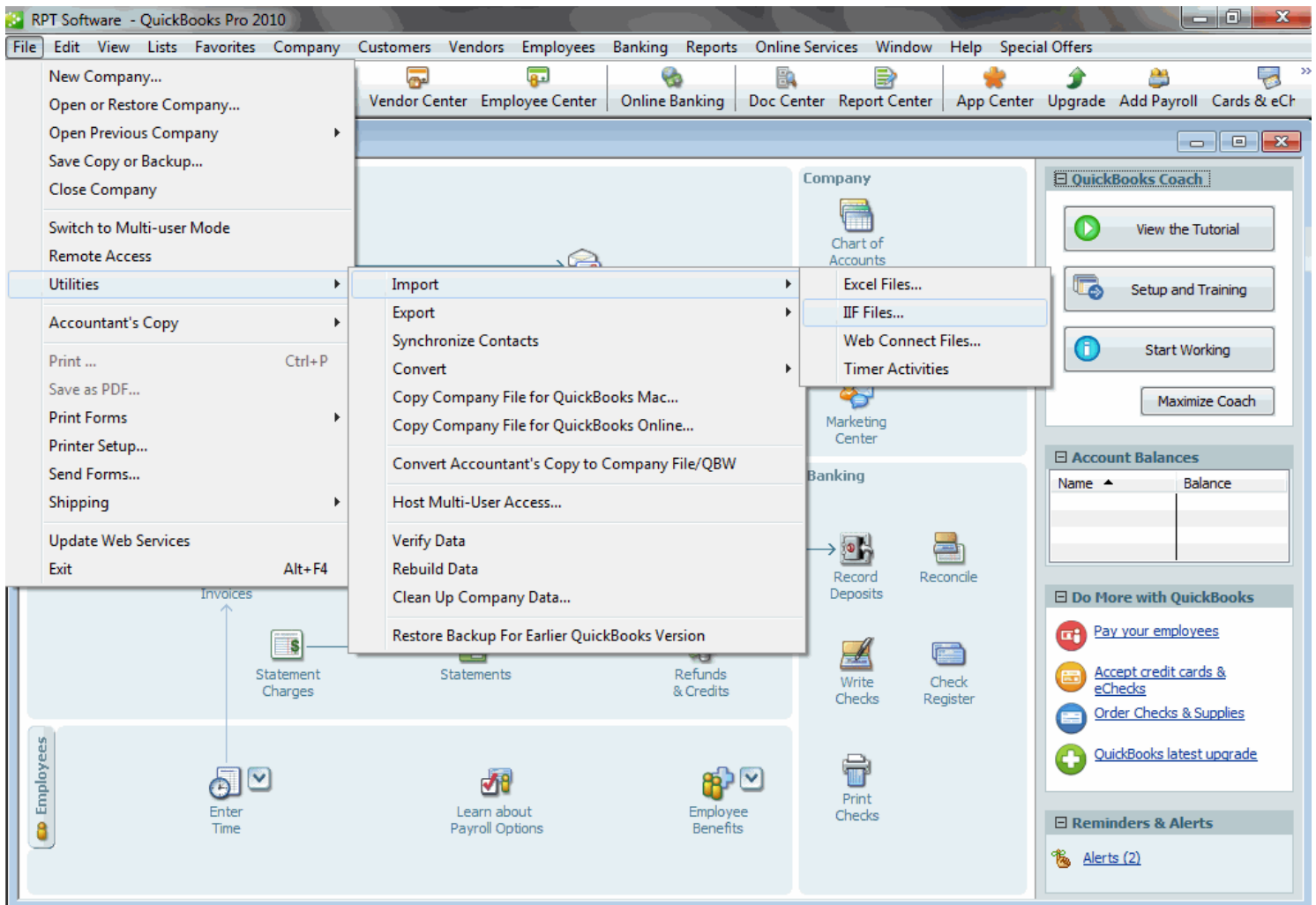
- Contacts are imported as Quickbooks "Customers"
- "Funds" and the "Quickbooks Class Name" you specified when setting up the fund will be exported as

Quickbooks "Classes"

- "Donation Types" and the "QuickBooks Income Account Name" you specified when setting up the Donation Type will be exported as QuickBooks Income Account Names
- "Donations" are exported to Quickbooks as Sales Receipts. Each donation becomes a separate Quickbooks sales receipt. This way, each donation is credited to the contact (or "customer") in Quickbooks, and the donation is also credited to the appropriate income account (Source).

We recommend you **Post** the batch of donations to lock them down in the donation software (since you have transferred the data to Quickbooks).

Note: people use Quickbooks in different ways, if this method of transferring all the details of each donation through an iif file do not meet your needs you also have the option of exporting to Excel in various ways with our software which could then be imported into Quickbooks or whatever accounting software you currently use.



A screenshot of how you import an iif file from Quickbooks.

Pledge Screen

General Tab

Pledge

Go to Save and New Save and Close Report E-mail Letter Add to Mailing List

General Pledge Schedule and Donations Notes

Pledge Date: 3/17/2010
Pledge Amount: \$700.00
Status: In Progress
Fund: General

Contact: O'leary, Mark
Employee:
Appeal:
In Honor Of:
In Memory Of:

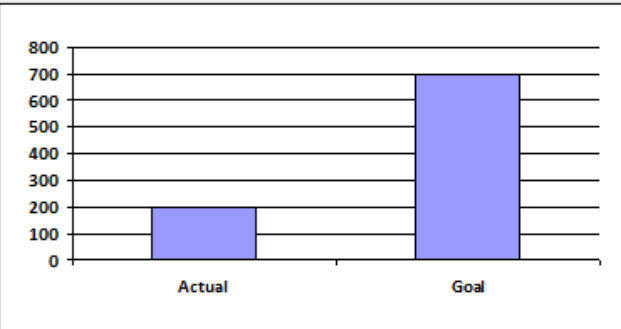
Campaign/Event
Campaign: Campaign to Save the Church
Event:

Correspondence Help on Correspondence
Correspondence: Sent Standard Pledge Letter
Correspondence Date: 3/20/2010
Acknowledged: Yes

Letters/Email sent for this pledge (double click to view):

Type	Template	Date/Time
------	----------	-----------

Pledge Summary:
\$200 collected (2 Donations)
29% of Pledge Collected
First Donation on 04/03/2010
Last Donation on 04/16/2010



Category	Value
Actual	200
Goal	700

The general tab contains most of the information about a pledge. In this example \$700 is pledged on 3/17/2010 and the pledge was acknowledged on 3/20/2010 with a standard pledge letter. \$200 of the \$700 has been collected so far. The Pledge Schedule and Donations tab lists the details of the pledge payment schedule and the actual donations (or pledge payments) made. Data collected includes:

- pledge date
- pledge amount
- status (user defined list of choices)
- fund (user defined list of funds)
- campaign (if the pledge was related to a certain campaign)
- event (if the pledge was related to a certain event)
- correspondence
- correspondence date

- acknowledged (when a correspondence is made this becomes "Yes")

Note: there are a few ways to do correspondence:

1. manual correspondence:

- you just specify how you did the correspondence and the date using the two fields shown and then outside of this program you send the letter, make the phone call, send the email etc...

2. **Letters**

- You can press the Letter button at the top of the screen to do a letter for this pledge. If you choose to record the correspondence after the letter is generated it records the history of this correspondence and shows the details in the list box at the bottom left of the screen. It will also show the correspondence on the contact's detail screen (since you generated an acknowledgment letter for this pledge and for this contact). See the letters section for more details.

3. **Email**

- You can press the Email button at the top of the screen to do an email for this pledge. If you choose to record the correspondence after the email is generated it records the history of this correspondence and shows the details in the list box at the bottom left of the screen. It will also show the correspondence on the contact's detail screen (since you generated an acknowledgment email for this pledge and for this contact). See the email section for more details.

You can also choose to add this pledge to a **mailing list** and handle the correspondence at a later time. Example: you send out pledge acknowledgments on Friday of every week.

- contact
 - employee
 - appeal (user defined list of choices for what caused the contact to make this donation)
 - in honor of
 - in memory of
-
- notes (general notes about this pledge, payment schedules etc...)

Pressing **Report** will generate a pledge summary report for this pledge (for easy printing of the pledge details).

The **Pledge schedule** and **Donations** received for this pledge are found in the Pledge Schedule and Donations tab

The **Notes** tab is just a big area to add notes about the details of this pledge.

Campaigns and Events

Campaign Screen

Campaign

Campaign: Campaign to Save the Church

Go to Save and New Save and Close Report

General Events Donations Pledges Activities

Campaign Name:

Start Date:

End Date:

Goal:

Cost:

Description:

Notes

Employee:

Fund:

Status:

Campaign Summary:
\$6,350 collected (12 Donations)
9% of Goal
First Donation on 08/05/2009
Last Donation on 01/13/2010

Category	Value
Actual	6,350
Goal	70,000

The campaign screen is used to add campaigns. Data collected includes:

- Campaign name
- start date
- end date
- goal
- cost
- description
- notes
- employee
- fund
- status

A summary of the donations collected for this campaign is shown in the bottom right.

The **events** tab shows related events.

The **donations** tab shows related donations.

The **pledges** tab shows related pledges.

The **activities** tab shows related activities

Clicking the **Report** button will generate a campaign summary report for this campaign. We use the thermometer image on this report.

Event Screen

Event

Event: Save the church golf outing

Go to Save and New Save and Close Report

General Participants Donations Pledges Activities

Event Name:

Start Date:

End Date:

Goal:

Cost:

Campaign:

Employee:

Status:

Description: A 3 day golf outing to help raise money for the "save the church campaign"

Notes

The golf outline will be held at Butler's golf course:
<http://www.butlersgolf.com/>

Event Summary:

\$3,400 collected (8 Donations)
68% of Goal
First Donation on 08/05/2009
Last Donation on 08/05/2009

Category	Amount
Actual	\$3,400
Goal	\$5,000

The event screen is used to add events. Data collected includes:

- event name
- start date
- end date
- goal
- cost
- description
- notes
- campaign (if related to a campaign)
- employee
- status
- a summary of the donations collected for/at this event is shown at the bottom right.

The **participants** tab shows contacts who participated in this event (attendance etc...).

The **donations** tab shows related donations.


The **pledges** tab shows related pledges.


The **activities** tab shows related activities

Clicking the **Report** button will generate a campaign summary report for this campaign. We use the thermometer image on this report.

Activities and Opportunities

Activity Screen

 Activity

 Activity

Go to Save and New Save and Close

Activity Type: Meeting

Activity Date: 5/4/2010

Activity Time: 9:00 AM

Completed? No

Contact: Andrews, Mark

Employee: Willis, Kelly

Campaign:

Event:

Description: Meet to talk about upcoming donation decisions.

Purpose: Provide Information

Outcome:

Add Attachments

Notes

An activity is a general purpose screen that captures information on appointments, emails, letters, faxes, phone calls, tasks (to dos) or any other type of activity you want. For example you might of had 3 phones calls, sent 2 emails, and have one scheduled appointment with this contact. You decide how much data you want to track. Activities can be linked to contacts, employees, campaigns, events or any combination of those 4 entities. You can also have attachments on each activity.

Opportunity Screen

Opportunity Screen

Opportunity

★ Opportunity

Go to Save and New Save and Close

Description	<input type="text" value="Sale of Product YYY"/>	Contact:	<input type="text" value="Smith, Steve"/>	
Opportunity Status	<input type="text" value="Active"/>	Employee:	<input type="text" value="Stevens, John"/>	
Opportunity Stage	<input type="text" value="2"/>	Estimated Close Date	<input type="text" value="4/14/2010"/>	
Estimated Revenue	<input type="text" value="\$50,000.00"/>	Won/Lost Date	<input type="text"/>	

Notes

Trying to sell product YYY to Steve Smith.
So far he is interested but is considering his options.

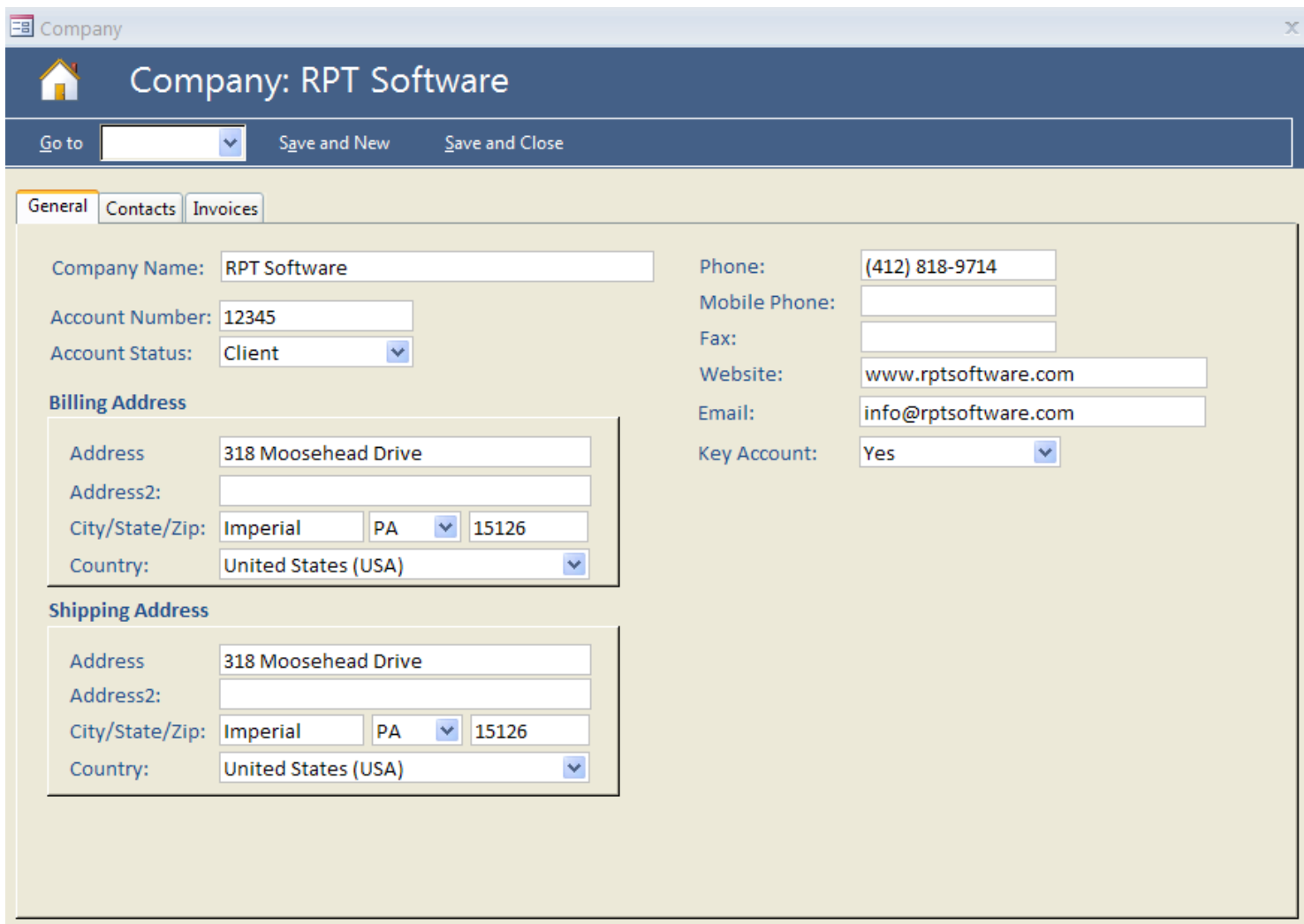
Add Attachments

An opportunity is a potential sale that you are working to try and close. Our software provides a general opportunity management system where we can track opportunities.

*This feature is only available in the **Professional Version** of the software.*

Companies, Employees and Invoices

Company Screen



Company

Company: RPT Software

Go to Save and New Save and Close

General Contacts Invoices

Company Name: RPT Software

Account Number: 12345

Account Status: Client

Billing Address

Address: 318 Moosehead Drive

Address2:

City/State/Zip: Imperial PA 15126

Country: United States (USA)

Shipping Address

Address: 318 Moosehead Drive

Address2:

City/State/Zip: Imperial PA 15126

Country: United States (USA)

Phone: (412) 818-9714

Mobile Phone:

Fax:

Website: www.rptsoftware.com

Email: info@rptsoftware.com

Key Account: Yes

The company screen is used to add company information. A company is a place where a contact works. Data collected includes:

- company name
- account number
- account status
- billing address
- shipping address

Note: billing and shipping addresses are used for invoices

- phone
- mobile phone
- fax
- website
- email
- key account

The **contacts** tab shows related contacts.

The **invoices** tab shows related invoices.

Employee Screen

The employee screen is used to enter employee information. Employees are people that work at your organization and are the users of this software. Throughout the program numerous items can be related to an employee so it's easy to always filter a list to see what a certain employee needs to do or what a certain employee was responsible for or associated with.

The screen is fairly simple:

- first name
- last name
- organization (type in or select from list)
- notes

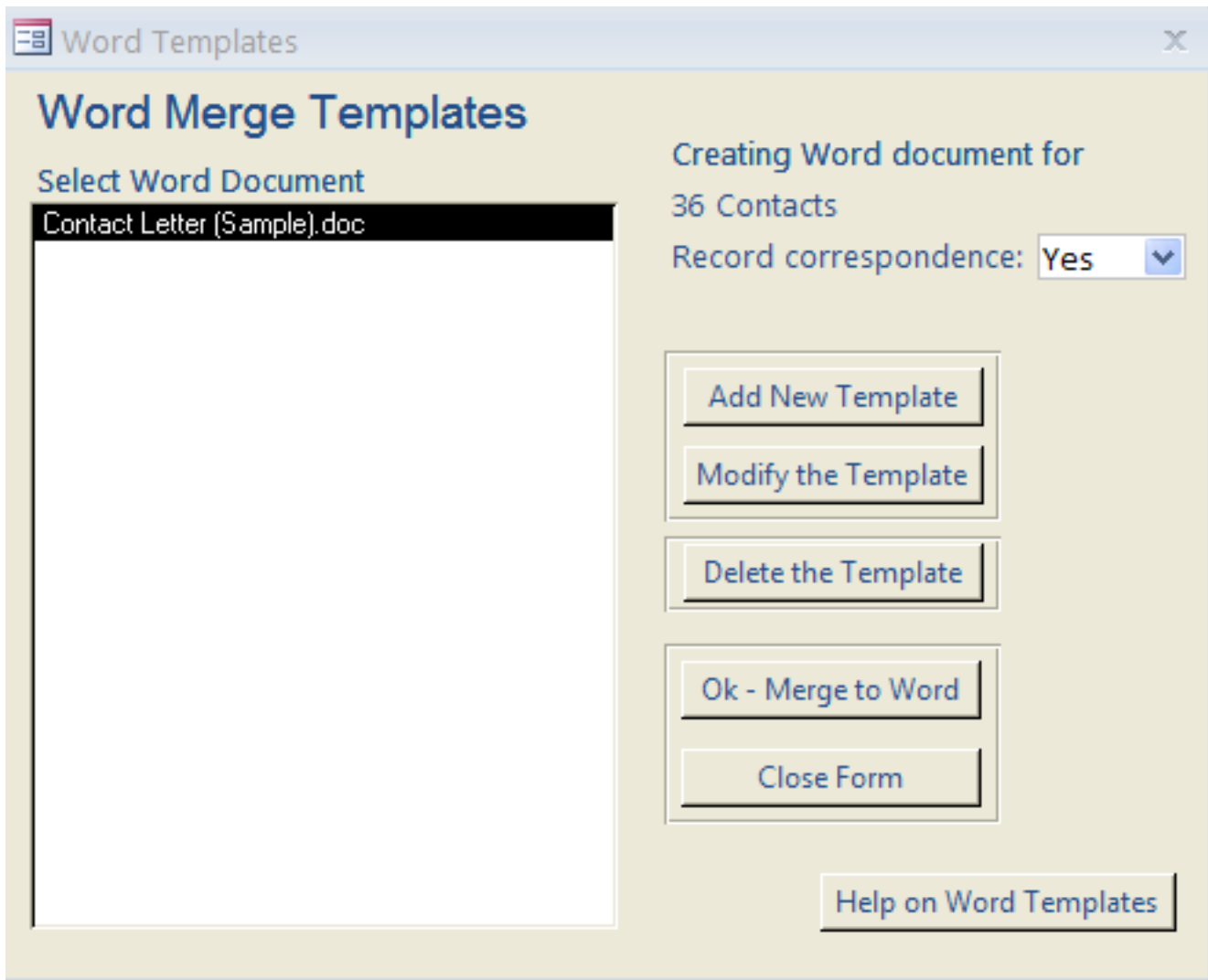
Note: You can use this for multiple organizations, however most users of this software are from just one organization.

The **activities** tab shows related activities.

The **opportunities** tab shows related opportunities.

Letter Correspondence

Creating a letter



The screenshot shows a window titled "Word Templates" with a close button (X) in the top right corner. Inside the window, the title "Word Merge Templates" is displayed in a large blue font. Below the title, there is a section labeled "Select Word Document" with a list box containing the text "Contact Letter (Sample).doc". To the right of the list box, the text "Creating Word document for 36 Contacts" is displayed. Below this, there is a label "Record correspondence:" followed by a dropdown menu showing "Yes" and a downward arrow. Below the dropdown menu, there are five buttons stacked vertically: "Add New Template", "Modify the Template", "Delete the Template", "Ok - Merge to Word", and "Close Form". At the bottom right of the window, there is a button labeled "Help on Word Templates".

There are a few different ways to create letters (Microsoft Word documents) from data in the database:

1. Contact Related Letters:

You can create contact related letters from the contact list screen or from the contact details screen.

Example #1: You filter the contact list screen to give you a list of 50 contacts and then you click the *letter* button to create a large document with 50 pages (one page per letter).

Example #2: You click the *letter* button from the contact detail screen to create a letter for that specific contact.

2. Donation Related Letters:

Donation related letters can only be created from the donation detail screen by clicking on the *letter* button.

3. Pledge Related Letters:

Pledge related letters can only be created from the pledge detail screen by clicking on the *letter* button.

4. Use a mailing list and create letters:

See the next topic in this manual on how to create letters from mailing lists.

Once you click the *letter* button you will open the screen showing you the available Microsoft Word templates on your computer. Microsoft word templates live in these directories:

Application directory\WordContact

Application directory\WordDonation

Application directory\WordPledge

Documents in the WordContact directory are specific to create letters from contacts.

Documents in the WordDonation directory are specific to create letters from donations.

Documents in the WordPledge directory are specific to create letters from pledges.

Functionality on the above screen is as follows:

- Add New Template

Will prompt you for the name of a new word template and start Microsoft Word and create a new word document.

Note: everything to do with setting up the mail merge connections is done for you, you just type in the contents of the new word document and add mail merge fields where appropriate. Click save when you are done and close the document.

- Modify the template

You select a template from the list and it opens this template for you to modify. Click save when you are done and close the document.

- Delete the template

Will delete the microsoft word document from your computer.

- OK Merge to Word

This is the most common button to click. It will do the process of creating your final document by taking the data from the database and merging it into the selected word document.

If you have an existing word document you can:

1 - place it in the appropriate directory

2 - modify the template

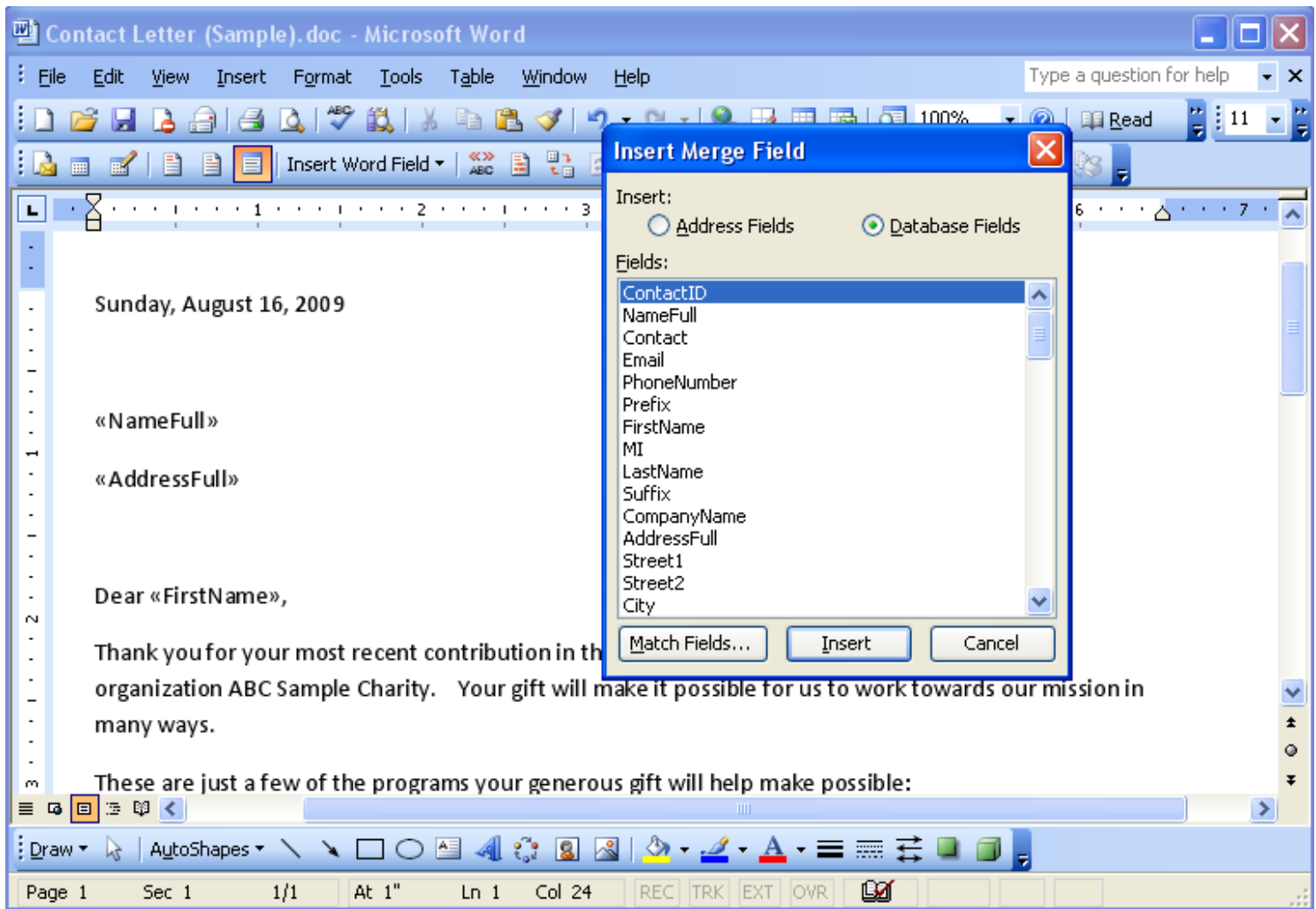
3 - save and close the document

This will setup the document so it can work with automatic word merge with the donation management software

Note: There is a option to "Record Correspondence", if set to "Yes" everytime you click the Ok - Merge to Word button the correspondence will be recorded. Example: on the above screen shot we are about

to create a Microsoft Word document for 36 contacts, so all 36 contacts will show that a letter was made at the current date/time. Correspondence history is found on the contact correspondence tab and on the donation and pledge detail screens.

Example of modifying a Microsoft word document




The above screen shot shows an example of modifying a Microsoft word document. In Microsoft word 2003 the insert merge field button is the one to the left of "Insert word field" on the toolbar (yes very confusing, don't blame us this is Microsoft's product). In Microsoft Word 2007 it is a little easier to use. If you need help with creating a word document please contact RPT Software. Remember to save and then close the document after you are done with changes.

After you create the word document you can then use the "OK - Merge to Word" and it will populate all the merge fields with data. Example: this one page thank you letter could be generated for all the contacts in your database with a push of a button.

Word documents for contacts, donations and pledges have different word merge fields available. Example: a donation word document might be used for a donation acknowledgment letter with specifics

on a single donation. A contact word merge document might be used to summarize the contributions of a contact over the past year or as a monthly newsletter.

Letters using mailing Lists

 **Letters**

Option: Work with Mailing Lists ▼ Help on letters and mailing lists

Mail Lists (select the mail list and click appropriate button):

Type	Name	Recipients
Contact	Monthly Newsletter Mail List	3
Donation	Donation Acknowledgement	0
Pledge	Pledge Acknowledgement	0

Create letters for mail list recipients
View/Edit mail list recipients

Edit mail list
Add new mail list
Delete mail list

Mail List: Monthly Newsletter Mail List

Description: This mail list is used for contacts that should get the monthly newsletter.

Recipients: 3
Recipients were first added to this list 1 day ago

To use a mailing list it's easiest to just give you some examples:

There are three types of mailing lists (contact, donation and pledge).

Example #1: Setup a contact mail list called "Monthly Newsletter Mail List" and use it to send a monthly newsletter

To setup the mail list:

- goto the letters screen (shown above)
- click add new mail list
- enter the type: "contact"
- enter the name: "Monthly Newsletter mail List"

enter the description: "This mail list is used for contacts that should get the monthly newsletter."

- click ok to save the mail list

Now we goto various contacts during a three week period and click the "Add to Mailing List..." button and add them to this mailing list.

So after three weeks we added (let's say 25) contacts to the mailing list.

Now we are ready to generate the monthly newsletter by doing the following:

- goto the letters screen (shown above)
- select the mail list (it should show there are currently 25 recipients, the bottom of the screen will show that they were first added three weeks ago)
- click the "create letters for mail list recipients" button
- this will launch the normal word merge process (described in the previous topic in this manual)

Note: remember the "Record Correspondence Yes/No" will determine if correspondence history is recorded.

After closing the Word merge screen it will ask if you "Ok to clear the recipient list for this mailing list?" You would choose to clear the recipients if you are done with this mailing list and don't want to do anything else with this list of 25 people.

Example: if you wanted to send a letter and email, you would not clear the list after making the letter and then clear the list after making an email.

Example: some mailing lists you might never clear the recipient list, some you clear after every use.

Example #2: Setup a mailing list for donation acknowledgments and use it every week to send donation acknowledgments

- Setup the mail list (very similar steps to above, except type equals "Donation" and name/description appropriate for donation acknowledgment mail list)
- Now we add donations throughout the week and on each donation we click the "Add to mailing list.." button and add it to this mailing list.
- After the week is over we added (lets say 20) donations to the mailing list
- Now we are ready to generate the donation acknowledgment letters for each of the 20 contacts/donations. Follow the similar process as above except choose our "donation acknowledgement" mail list and create the letters for each of these unique donations.

Email Correspondence

Email Getting Started/Tips and Tricks

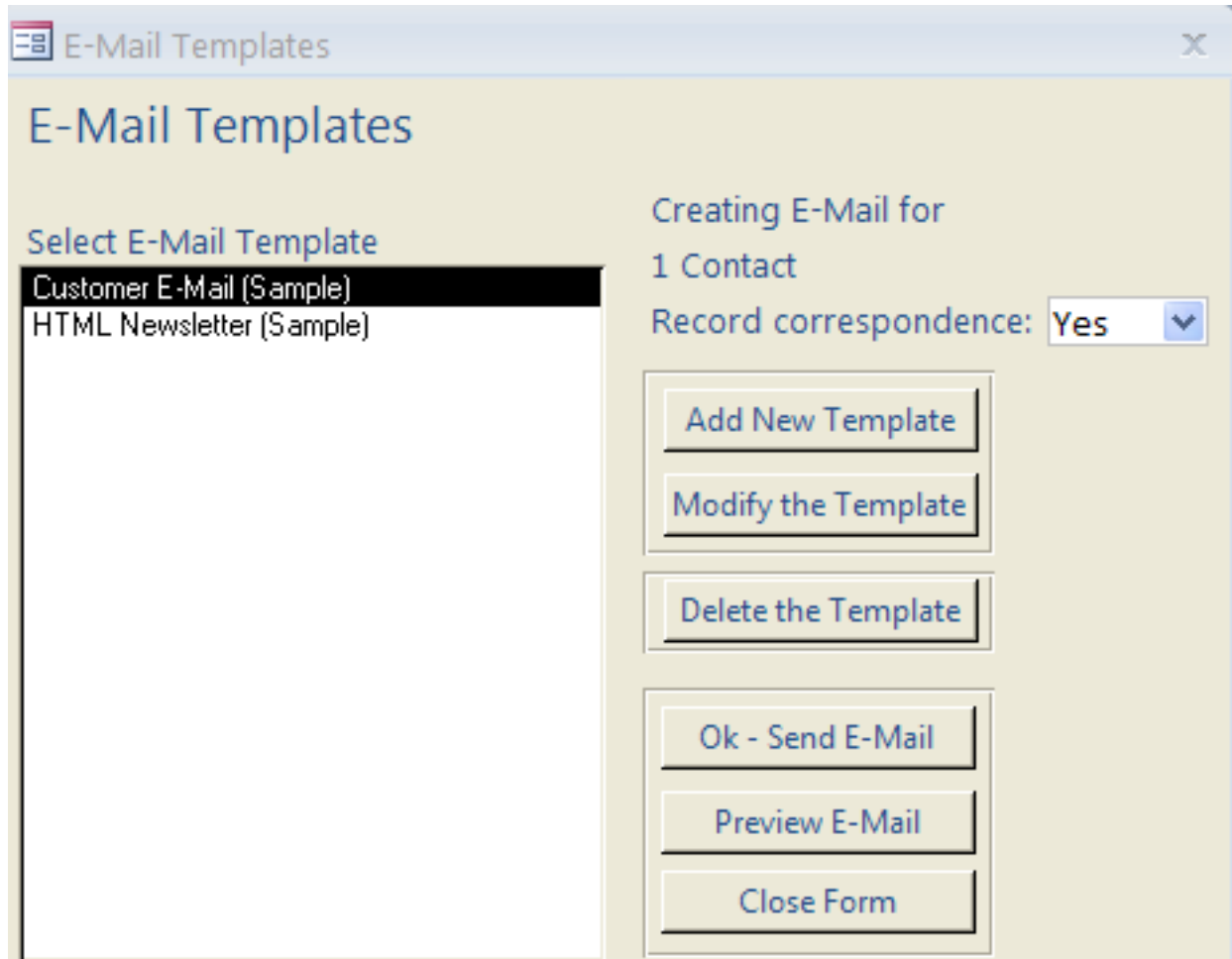
Before you can send any email using customized email templates you must supply email server setting in the Setup/Options section of the software.

Sending massive amounts of email is never a good idea. Our customized email templates are designed primarily for sending small amounts of email. Sending large amounts of email could cause problems with your Email provider and could cause problems with organizations you are sending the emails.

For large email blasts try an email service like "Constant Contact".

Contact RPT Software for more information if needed.

Creating an email



The screenshot shows a window titled "E-Mail Templates". On the left, under "Select E-Mail Template", there is a list with "Customer E-Mail (Sample)" and "HTML Newsletter (Sample)". On the right, under "Creating E-Mail for 1 Contact", there is a "Record correspondence:" label with a dropdown menu set to "Yes". Below this are three buttons: "Add New Template", "Modify the Template", and "Delete the Template". At the bottom of the right panel are three buttons: "Ok - Send E-Mail", "Preview E-Mail", and "Close Form".

There are a few different ways to create emails from data in the database:

1. Simple emails vs. Customized email templates

When you click the *E-Mail* button anywhere through the software it will ask if you want to use a customized e-mail template? If you choose "yes" you will see the screen above. If you choose "No" the program will try and launch a regular email using your default e-mail client and try and fill in the "to" email address with the appropriate email address(es).

If you choose "yes" to using a customized email template, continue reading:

There are three types of customized email templates:

1. Contact Related Emails:

You can create contact related emails from the contact list screen or from the contact details screen.

Example #1: You filter the contact list screen to give you a list of 50 contacts and then you click the *email* button to create 50 individual emails.

Example #2: You click the *email* button from the contact detail screen to create an email for that specific contact.

2. Donation Related Emails:

Donation related emails can only be created from the donation detail screen by clicking on the *email* button.

3. Pledge Related Emails:

Pledge related emails can only be created from the pledge detail screen by clicking on the *email* button.

4. Use a mailing list and create emails:

See the next topic in this manual on how to create emails from mailing lists.

Once you click the *email* button you will open the screen showing you the available email templates stored in the database. Email templates are stored right in the database (not like word templates which live outside the database)

Functionality on the above screen is as follows:

- Add New Template

Will open a new screen with a blank email template

- Modify the template

You select a template from the list and it opens this template for you to modify.

- Delete the template

Will delete the selected email template.

- OK - Send Email

Will change the screen and start sending emails (see screen shot below). As each individual email is sent you will see the status on this screen.

There are a few different ways to create email from data in the database:

1. Contact Related Email:

You can create contact related emails from the contact list screen or from the contact details screen.

Example #1: You filter the contact list screen to give you a list of 50 contacts and then you click the *email* button to create 50 emails.

Example #2: You click the *email* button from the contact detail screen to create an email for that specific contact.

2. Donation Related Email:

Donation related emails can only be created from the donation detail screen by clicking on the *email* button.

3. Pledge Related Emails:

Pledge related emails can only be created from the pledge detail screen by clicking on the *email* button.

4. Use a mailing list and create emails:

See the next topic in this manual on how to create emails from mailing lists.

Note: There is a option to "Record Correspondence", if set to "Yes" every time you click the "Ok - Send Emails" button the correspondence will be recorded. Example: on the above screen shot we are about to create an email for 1 contact, this contact will show that an email was made at the current date/time and the contents of the email will be saved in the correspondence history (without attachments). Correspondence history is found on the contact correspondence tab and on the donation and pledge detail screens.

The screenshot shows a window titled "Email Template" with a close button (X) in the top right corner. The window is divided into several sections:


- Email Template Name:** A text field containing "Customer E-Mail (Sample)".
- Email Template Type:** A dropdown menu set to "Contact".
- From:** A text field containing "test@rptsoftware.com".
- To:** A text field containing "##Email##".
- CC:** An empty text field.
- BCC:** An empty text field.
- Subject:** A text field containing "Thank You for your support".
- E-Mail Type:** A dropdown menu set to "Text".
- Insert Merge Field:** A dropdown menu with a downward arrow.
- Add Attachments:** A button with a plus icon.
- Body (Text):** A large text area containing the following text:

```
##DateTodayLong##  
  
##NameFull##  
##AddressFull##  
  
Dear ##FirstName##,  
  
Thank you for your most recent contribution in the amount of ##LastDonationAmount## to my organization ABC Sample Charity. Your gift will make it possible for us to work towards our mission in many ways.  
  
These are just a few of the programs your generous gift will help make possible:  
- ISample program #1  
- ISample program #2  
- ISample program #3  
  
Thank you again for your support.  
Sincerely,  
John Smith  
President ABC Sample Charity  
Your gift is tax deductible. [INSERT limitations, as necessary]
```
- OK:** A button at the bottom center.

We tried to make the functionality of creating an email template similar to how Microsoft word works to create mail merge documents. You fill out the various fields and insert merge fields where appropriate.

Emails can be constructed as simple text emails or HTML emails. If using HTML the HTML will be displayed to the user if they have a email reader that can display HTML, otherwise they will see the text version of the email. HTML emails require a knowledge of HTML and require all images to be placed on an internet website. Contact RPT Software for more details on creating HTML email templates.

Email using mailing lists

 **E-Mail**

Option: Work with Mailing Lists ▼ Help on E-Mail and mailing lists

Mail Lists (select the mail list and click appropriate button):

Type	Name	Recipients
Contact	Monthly Newsletter Mail List	3
Donation	Donation Acknowledgement	0
Pledge	Pledge Acknowledgement	0

Create E-Mail for mail list recipients
View/Edit mail list recipients

Edit mail list
Add new mail list
Delete mail list

Mail List: Monthly Newsletter Mail List

Description: This mail list is used for contacts that should get the monthly newsletter.

Recipients: 3

Recipients were first added to this list 1 day ago

To use a mailing list it's easiest to just give you some examples:

There are three types of mailing lists (contact, donation and pledge).

Example #1: Setup a contact mail list called "Monthly Newsletter Mail List" and use it to send a monthly email newsletter

To setup the mail list:

- goto the letters screen (shown above)
- click add new mail list
- enter the type: "contact"
- enter the name: "Monthly Newsletter mail List"

enter the description: "This mail list is used for contacts that should get the monthly newsletter."

- click ok to save the mail list

Now we goto various contacts during a three week period and click the "Add to Mailing List..." button and add them to this mailing list.

So after three weeks we added (let's say 25) contacts to the mailing list.

Now we are ready to generate the monthly newsletter by doing the following:

- goto the email screen (shown above)
- select the mail list (it should show there are currently 25 recipients, the bottom of the screen will show that they were first added three weeks ago)
- click the "create email for mail list recipients" button
- this will launch the normal email merge process (described in the previous topic in this manual)

Note: remember the "Record Correspondence Yes/No" will determine if correspondence history is recorded.

After closing the Email merge screen it will ask if you "Ok to clear the recipient list for this mailing list?" You would choose to clear the recipients if you are done with this mailing list and don't want to do anything else with this list of 25 people.

Example: if you wanted to send a letter and email, you would not clear the list after making the letter and then clear the list after making an email.

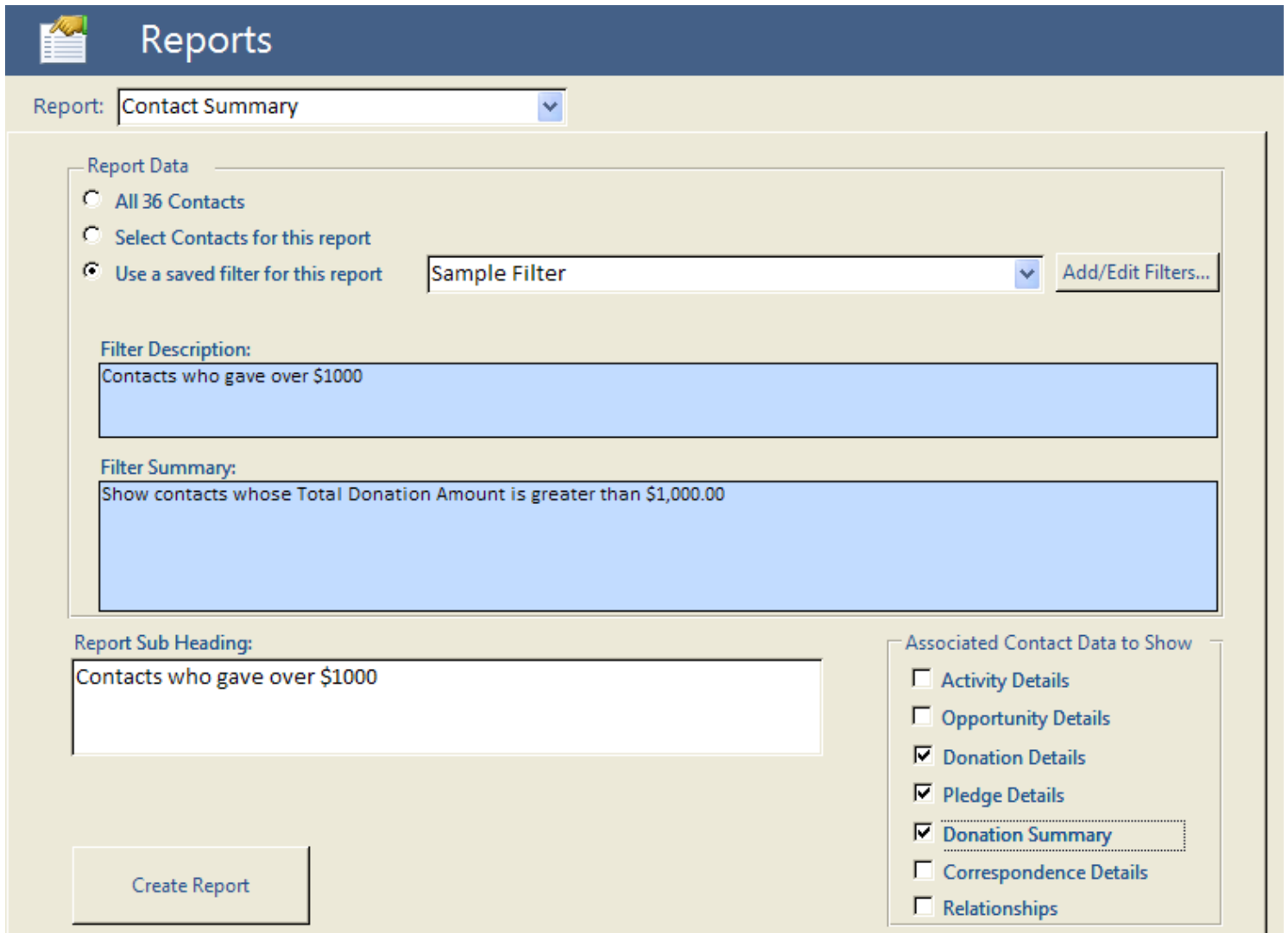
Example: some mailing lists you might never clear the recipient list, some you clear after every use.

Example #2: Setup a mailing list for donation acknowledgments and use it every week to send donation acknowledgments

- Setup the mail list (very similar steps to above, except type equals "Donation" and name/description appropriate for donation acknowledgment mail list)
- Now we add donations throughout the week and on each donation we click the "Add to mailing list.." button and add it to this mailing list.
- After the week is over we added (lets say 20) donations to the mailing list
- Now we are ready to generate the donation acknowledgment emails for each of the 20 contacts/donations. Follow the similar process as above except choose our "donation acknowledgement" mail list and create the emails for each of these unique donations.

Reporting

Reporting Screen



Reports

Report: Contact Summary

Report Data

☐ All 36 Contacts

☐ Select Contacts for this report

☒ Use a saved filter for this report Sample Filter Add/Edit Filters...

Filter Description:
Contacts who gave over \$1000

Filter Summary:
Show contacts whose Total Donation Amount is greater than \$1,000.00

Report Sub Heading:
Contacts who gave over \$1000

Create Report

Associated Contact Data to Show

- ☐ Activity Details
- ☐ Opportunity Details
- ☒ Donation Details
- ☒ Pledge Details
- ☒ Donation Summary
- ☐ Correspondence Details
- ☐ Relationships

The reports screen allows for a number of report to be selected. Each report has various options that the user can supply to affect what data is on the report and how the report looks. For example in the above screen I selected a "Contact Summary" report and choose that a filter should be used to restrict the report to only the contacts returned by the Filter. The report will show:

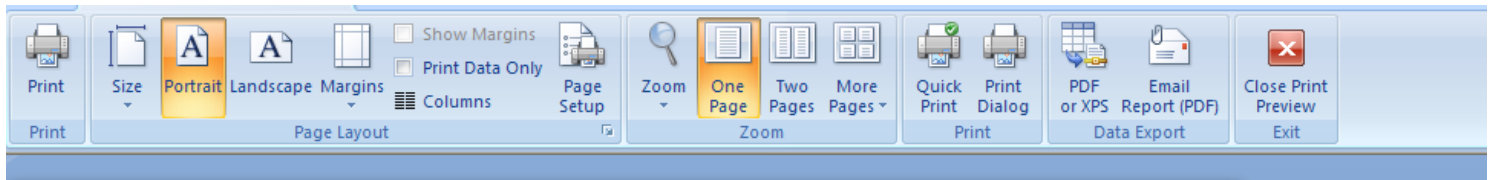
- contact data
- related donations for each contact
- related pledges for each contact
- donation summary text for each contact

based on the check boxes I selected in the lower right.

It will also use a sub title of "Contacts who gave over \$1000"

Click "Create Report" to create the report

Example of one report



Donation List

Contacts who gave over \$1000
Date Range: All Dates

Contact	Date	Amount	Donation Type	Campaign	Fund
Smith, Steve	12/28/2009	\$500.00	Individual Contribution	Campaign to Save the Church	Building Fund
Salakas, Sheryl	12/9/2009	\$2,000.00	Individual Contribution	Campaign to Save the Church	Building Fund
Smith, Steve	11/17/2009	\$300.00	Individual Contribution		Building Fund
Smith, Steve	7/16/2009	\$300.00	Individual Contribution		Building Fund
Smith, Steve	4/2/2009	\$300.00	Individual Contribution		Building Fund

When a report is displayed you can use the controls on the ribbon to print the report, export the report, zoom etc...

At the bottom of the report you can choose to cycle through the pages.

Click "Close Print Preview" when you are done with the report.

Using reports from details screens

The screenshot displays the 'rptCampaignSummary' window within the 'Donation Management Software'. The main title is 'Campaign Summary'. It provides details for the 'Campaign to Save the Church', including the employee 'Stevens, John', the fund 'Building Fund', and the status 'In Progress'. The campaign dates are from 7/1/2009 to 7/1/2010, with a goal of \$50,000.00 and a cost of \$4,000.00.

The description states: 'We want to save the church on Main Street.' Notes include the campaign summary: '\$6,350 collected (12 Donations) 13% of Goal', the first donation on 08/05/2009, and the last donation on 01/13/2010.

A progress bar shows the goal of \$50,000 and the amount raised of \$6,350. A red circle highlights the 'Amount Raised' value.

A context menu is open over the progress bar, offering options: 'Print...', 'Quick Print', 'Page Setup...', 'Export to PDF...', 'Email Report (PDF)...', and 'Close Report'.

Below the progress bar is a table of donations:

Date	Amount	Donation Type	Campaign	Fund
1/13/2010	\$200.00	Individual Contribution	Campaign to Save the Church	Building Fund
12/25/2009	\$500.00	Individual Contribution	Campaign to Save the Church	Building Fund
12/9/2009	\$2,000.00	Individual Contribution	Campaign to Save the Church	Building Fund
12/5/2009	\$250.00	Individual Contribution	Campaign to Save the Church	Building Fund
8/5/2009	\$400.00	Individual Contribution	Campaign to Save the Church	Building Fund
8/5/2009	\$500.00	Individual Contribution	Campaign to Save the Church	Building Fund
8/5/2009	\$400.00	Corporation Contribution	Campaign to Save the Church	Building Fund
8/5/2009	\$400.00	Individual Contribution	Campaign to Save the Church	Building Fund
8/5/2009	\$400.00	Individual Contribution	Campaign to Save the Church	Building Fund
8/5/2009	\$400.00	Individual Contribution	Campaign to Save the Church	Building Fund
8/5/2009	\$400.00	Corporation Contribution	Campaign to Save the Church	Building Fund
8/5/2009	\$500.00	Club/Organization Contribution	Campaign to Save the Church	Building Fund
8/5/2009	\$400.00	Corporation Contribution	Campaign to Save the Church	Building Fund

The page footer indicates 'Friday, January 08, 2010' and 'Page 1 of 2'.

On the right side of the interface, there is a sidebar with the title 'e Church' and a 'Report' button. Below this, it shows the employee 'Stevens, J', the fund 'Building F', and the status 'In Progress'. A 'Campaign Summary' section repeats the key statistics: '\$6,350 collected (12 Donations) 13% of Goal', 'First Donation on 08/05/2009', and 'Last Donation on 01/13/2010'. At the bottom right, a bar chart shows the 'Actual' amount raised, with a y-axis ranging from 0 to 60,000.

Here's an example of running a report from a detail screen. I was on the campaign detail screen and clicked the report button. It create a campaign summary report for my campaign. The trick is you need to know to **RIGHT-CLICK** the screen to bring up the menu to print the report or export the report to pdf etc....

Filtering

Simple Filtering of List Screens

Text Field Filter

City	State	Zip/Postal Code	Country/Region	Status	Type
Imperial	CA	92543	United States	Active Donor	Consultant
Ocala	FL	32801	United States	Active Donor	Volunteer
Chicago	IL	60601	United States	Inactive Donor	Technical
Los Angeles	CA	90001	United States	Active Donor	Technical
Savannah	GA	31401	United States	Active Donor	Consultant
Pittsburgh	PA	15201	United States	Active Donor	Billing
Pittsburgh	PA	15201	United States	Active Donor	Board Member
Pittsburgh	PA	15201	United States	Active Donor	Billing
Houston	TX	77001	United States	Active Donor	Other
Tampa	FL	33601	United States	Active Donor	Other
Austin	TX	78701	United States	Active Donor	Billing
Pittsburgh	PA	15201	United States	Active Donor	Billing
Monroe	LA	70001	United States	Active Donor	Billing
Newport Hills	CA	92566	United States	Active Donor	Other
Everett	WA	98201	United States	Active Donor	Technical
Newport Hills	CA	92566	United States	Active Donor	Volunteer
Everett	WA	98201	United States	Active Donor	Billing
Everett	WA	98201	United States	Active Donor	Other
Everett	WA	98201	United States	Active Donor	Technical
Everett	WA	98201	United States	Active Donor	Billing

On every List screen every column has a little arrow on the right hand side and if you click on that arrow it gives you the options to sort or filter the list based on data in this column. In this example we selected a text field "City".

- It has options to sort ascending or descending
- It has options to check individual cities (only shown if the discrete choices are not too many)
- It has text filtering options (Equals..., does not equal..., begins with..., etc...)

These options allow for all different types of filtering for easy finding of the data that you want.

Numeric Field Filter

Donation Amount	Donation Type	Fund	Contact
\$200.0		ng Fund	Andrews, Mark
\$500.0		ng Fund	Smith, Steve
\$2,000.0		ng Fund	Salakas, Sheryl
\$250.0		ng Fund	Andrews, Mark
\$300.0			Steve
\$400.0			s, Mark
\$400.0			Hannah
\$400.0			rannon
\$400.0			Richard
\$400.0		ng Fund	Mokwa, Tom
\$500.0		ng Fund	Smith, John
\$400.0		ng Fund	Smith, Leslie
\$500.0		ng Fund	Sullivan, George
\$300.0		ng Fund	Smith, Steve
\$300.0		ng Fund	Smith, Steve
\$300.0		ng Fund	Smith, Steve

Here we show filtering on a Numeric field "Donation Amount". Works similar to filtering on a text field except the filtering options are (Equals..., Does Not Equal..., Less Than..., Greater Than..., and Between...).

Date Field Filter

Show/Hide Fields
Export to Excel

Search Donations
Go

Donation Date	Donation Amount	Donat
1/13/20		
12/28/20		
12/9/20		
12/8/20		
11/17/20		
8/5/20		
8/5/20		
8/5/20		
8/5/20		
8/5/20		
8/5/20		
8/5/20		
8/5/20		
7/16/20		
4/2/20		
1/8/20		
9/10/2008	\$300.00	Individ
5/16/2008	\$200.00	Individ
2/7/2008	\$400.00	Individ
11/20/2007	\$300.00	Individ
7/3/2007	\$250.00	Individ

Sort Oldest to Newest
Sort Newest to Oldest
Clear filter from Donation Date

Date Filters

☒ (Select All)
☒ (Blanks)
☒ 10/4/2006
☒ 4/4/2007
☒ 7/3/2007
☒ 11/20/2007
☒ 2/7/2008
☒ 5/16/2008
☒ 9/10/2008
☒ 1/8/2009

OK Cancel


Equals...
Does Not Equal...
Before...
After...
Between...
Tomorrow
Today
Yesterday
Next Week
This Week
Last Week
Next Month
This Month
Last Month
Next Quarter
This Quarter
Last Quarter
Next Year
This Year
Year To Date
Last Year
Past
Future
All Dates In Period

Here we show filtering on a Date field "Donation Date". Works similar to filtering on a text field except the filtering options are specific to date fields. Example: You might filter on donation date to show donations that occurred this month.

Advanced Filters (Very Powerful Feature)

Filters are advanced queries to return contacts that meet certain criteria. Example a simple filter might be "select all contacts who gave more than \$500 last year and that live in "pittsburgh". Filters can be used on List Screens and on reports to restrict the data you see.

Filter List

 Filters ✕

Double click row to edit, right click column to sort

Search:

Name

Sample Filter

Description

Contacts who gave over \$1000

Category

Marks Filters

Add...

Edit...

Delete...

Duplicate Filter...

Close

The Filter list is the string point to add, edit, delete or duplicate filters. Select a filter and double click or click on "edit" to change a filter.

Main Filter Screen

Filter: Sample Filter

Go to Save and New Save and Close

Assign the Filter a Name, Description and Category.

Name:

Description:

Category:

Add Criteria Set(s) for the Filter.

Show Don't Show

Add Criteria Set...

Show contacts whose Total Donation Amount is greater than \$1,000.00 Edit... Delete...

Results from this Filter: Total Records: 2 Show/Hide Fields...

	Open	First Name	MI	Last Name	Company	Job Title	Birthday	Addressee	Address
	Open	Steve		Smith	RPT Software	HR Manager	8/12/1968	Steve Smith	123 Main S
	Open	Sheryl		Salakas				Sheryl Salakas	123 Main S

This is the main screen for setting up a filter. You must give a filter a name, description and category. Then you add the criteria sets for the filter. Click Add Criteria Set... to add a new set or edit an existing set of criteria. The bottom of the page shows the contacts that are returned by running the filter.

Filters are one of the most complex topics in this software, we recommend you watch the video explaining filters or spend some time playing with filters.

Editing ONE Criteria Set

The screenshot shows a window titled "Edit Criteria Set" with a close button (X) in the top right corner. Below the title bar is a dark blue header with a funnel icon and the text "Criteria Set". The main area has a light beige background. On the left, it says "Edit the Criteria Lines for this Criteria Set:". To the right of this text is a button labeled "Append a New Criteria Line...". Below this, there is a large light blue rectangular area containing two lines of criteria. The first line is "Show contacts whose: Total Donation Amount is greater than \$1,000.00" and the second line is "and whose: City is 'Chicago' or 'Pittsburgh'". To the right of each line are two buttons: "Edit..." and "Delete...". At the bottom center of the window is an "OK" button.

Edit Criteria Set

Criteria Set

Edit the Criteria Lines for this Criteria Set: [Append a New Criteria Line...](#)

Show contacts whose: Total Donation Amount is greater than \$1,000.00 [Edit...](#) [Delete...](#)

and whose: City is 'Chicago' or 'Pittsburgh' [Edit...](#) [Delete...](#)

[OK](#)

Editing ONE set of criteria brings up this screen. You can add as many lines of criteria as you need. ALL of lines of criteria MUST BE MET. So for this example, the contact (must of donated more than \$1000) and (live in Pittsburgh or Chicago).

Note: Lots of filters will only use ONE set of criteria (perhaps with a line or a few lines of criteria).

Editing ONE Line of criteria

Filter Criteria

Choose Criteria Field...

Donation History - Total Donation Amount

Details

☐ Is less than ☒ Is greater than ☐ Is equal to ☐ Is between

\$1,000.00

Summary: Show contacts whose Total Donation Amount is greater than \$1,000.00

OK Cancel

This is the screen you do most of the work on.

Step 1: Choose the criteria field (click the button at the top and a pop up menu will appear with LOTS of different fields to choose from.

Step 2: Based on the type of field that is chosen you will be able to add the details about what you are trying to do. In this example a numeric field was choose and I choose to select "IS Greater than" and entered "\$1000".

Setup/Options

Setup/Options Screen

The screenshot shows a window titled "Setup/Options" with a blue header bar. The main content area is divided into several sections, each with a title and a list of options or instructions.

- Unlocking the Software**
 - Step 1 - Purchase the software at: www.donationmanagementsoftware.com
 - Step 2 - Receive the registration code via email
 - Step 3 - Enter the registration code to unlock the software
 - Enter Registration Code
 - Version: **Professional (Single User)**
 - Step 4 - Remove the sample data.
 - Remove Sample Data
- E-Mail Setup**
 - E-Mail Setup
 - Email Setup
- Backup Database**
 - Backup Database
 - Backup Database
- Hide/Show Areas**
 - Hide/Show Areas
 - Hide/Show Areas
- Import Data**
 - Import Data
 - Import Data
- Dropdown Maintenance**
 - Contact Info
 - Contact Categories
 - Contact Prefixes
 - Contact Suffixes
 - Contact Donor Levels
 - Contact Types
 - Contact Status
 - Contact Sources
 - Contact Next Steps
 - Contact Group Names
 - Contact Relationship Types (Work)
 - Contact Relationship Types (Family)
 - Contact Relationship Types (Other)
 - Activity Info
 - Times
 - Activity Types
 - Activity Purposes
 - Activity Outcomes
 - Opportunity Info
 - Opportunity Stages
- Donation Info**
 - Donation Types
 - Payment Types
 - Funds
 - Appeals
 - Donation Correspondence Types
 - Donation Contact Roles
- Pledge Info**
 - Pledge Status
 - Payment Types
 - Funds
 - Appeals
 - Pledge Correspondence Types
- Campaign Info**
 - Campaign Status
 - Funds
- Event Info**
 - Event Status
- Invoice Info**
 - Products
- Misc Info**
 - States
 - Countries

An "OK" button is located at the bottom center of the window.

the setup/options screen is used for a variety of tasks.

Unlocking the Software

Initially you download the evaluation version. After you purchase the software (via our website) you receive a registration code in an email. You then click on the "Enter Registration Code" button to enter you registration code and then activates the product and transforms the software into the version you purchased. Optionally you can use the "Remove Sample Data" button to remove all the sample data found in the evaluation version of the software.

Note: removing sample data will not remove certain drop down lists etc.... It will remove all the contacts and their related donations, pledges etc... (that were found in the evaluation). At that point you can

enter you own data into the program.

E-Mail Setup

- see section below on email setup

*This feature is only available in the **Professional Version** of the software.*

Backup database

- clicking the "Backup Database" button will make a copy of the back-end database in the current directory. It's an easy way to backup the data. Data should be backed up on a regular basis and moved to an external location if possible. With the program closed you can also just copy the "Donation.accdb" file (this contains all your data) to your backup location. If you create extra word templates these should also be backed up.

Hide/Show Areas

- see section below on Hide/Show Areas

*This feature is only available in the **Professional Version** of the software.*

Import Data

- this feature is used to import contact data from an Excel spreadsheet into the database. The screen walks you through the process which is basically:
 - click a button and the program makes the Excel spreadsheet (with all the exact column headings that are needed).
 - you then either get your data into this excel file or move the column headings to your excel file and putt all the data in the right places.
 - you click a button and it adds the new contacts to the database

This can be used for initial setup fo the database to move contact data from your existing database or Excel spreadsheets or on an ongoing basis, for example if you get contact data every so often and need to add it to the database.

Note: for a more complicated data conversion or interface with other systems please contact RPT Software for help.

Drop down Maintenance

This area has all the drop downs and other information that can be customized. About 90% of these buttons can also be done directly from the details screens.

Email Setup

Email Setup

Email Setup

Servermail.rptsoftware.com

Mail Fromdonation@rptsoftware.com

Send To

Message SubjectTest email

Message TextThis is a test email.

Send a Test Email

Authentication settings

TypeAuth Login

Username donation@rptsoftware.com

Password*****

POP3 Server

NOTE:

The default settings of:

- Server: mail.rptsoftware.com

- Username: donation@rptsoftware.com

- Password: donation

Can be used to evaluate the product, however once you purchase the product you should use your own email settings to send mail.

We cannot guarantee that these default settings will work! Please test sending an email.

See <http://www.donationmanagementsoftware.com> for more info on how to configure email settings.

Status

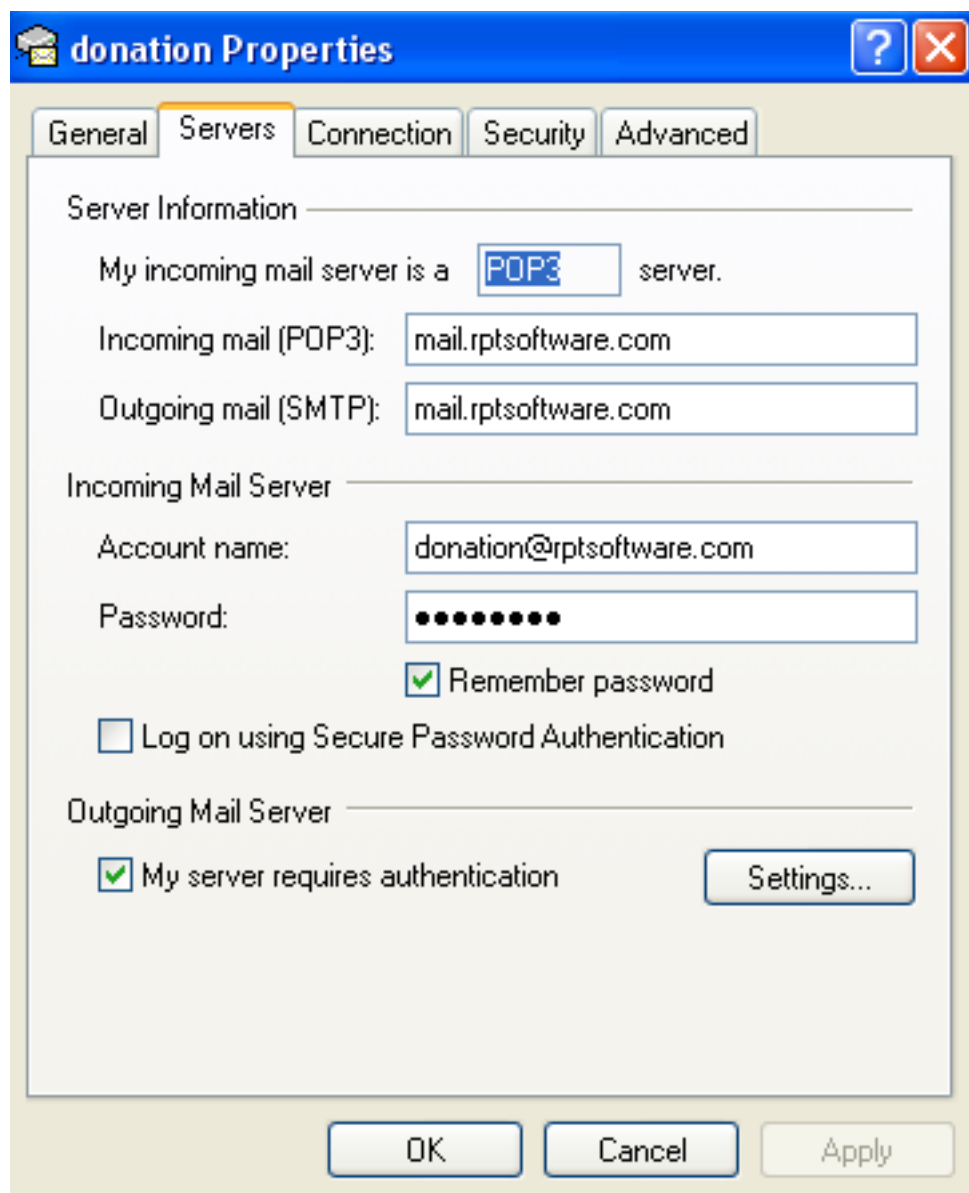
OK

If you want to use customized email templates and have this software send emails you must first do email setup.

By default we supply a set of email credentials (however we only allow up to 5 emails to be sent out at one time).

After you supply your email server settings (on the left side of the screen), you can test these settings by sending a quick test email by using the right side of the screen. If the test email works your email settings will work for the program.

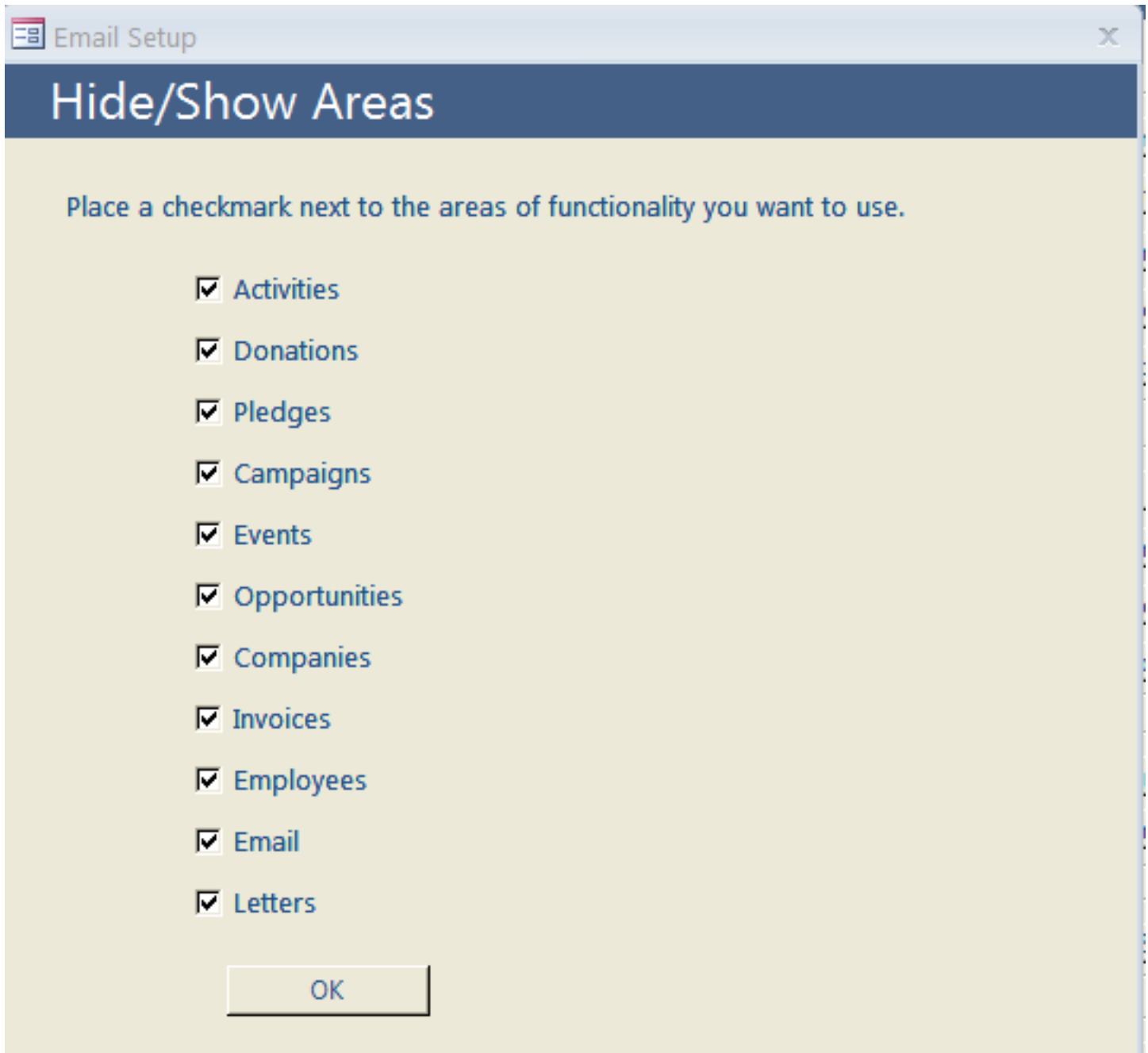
*This feature is only available in the **Professional Version** of the software.*



If you use Outlook Express to read/send email you can do the following to get your email settings:

1. Got Tools/Accounts... on the top menu
2. Double click or select properties for the desired Mail account, a new screen will open.
3. Select the Servers tab (you should be looking at a screen like the screen shot above)
4. Your *Outgoing mail (SMTP)* is the mail server you want to enter.
5. Type is usually *Auth Login*
6. For username and password see the username/password used at the very bottom in the Outgoing Mail Server Settings...

Hide/Show Areas



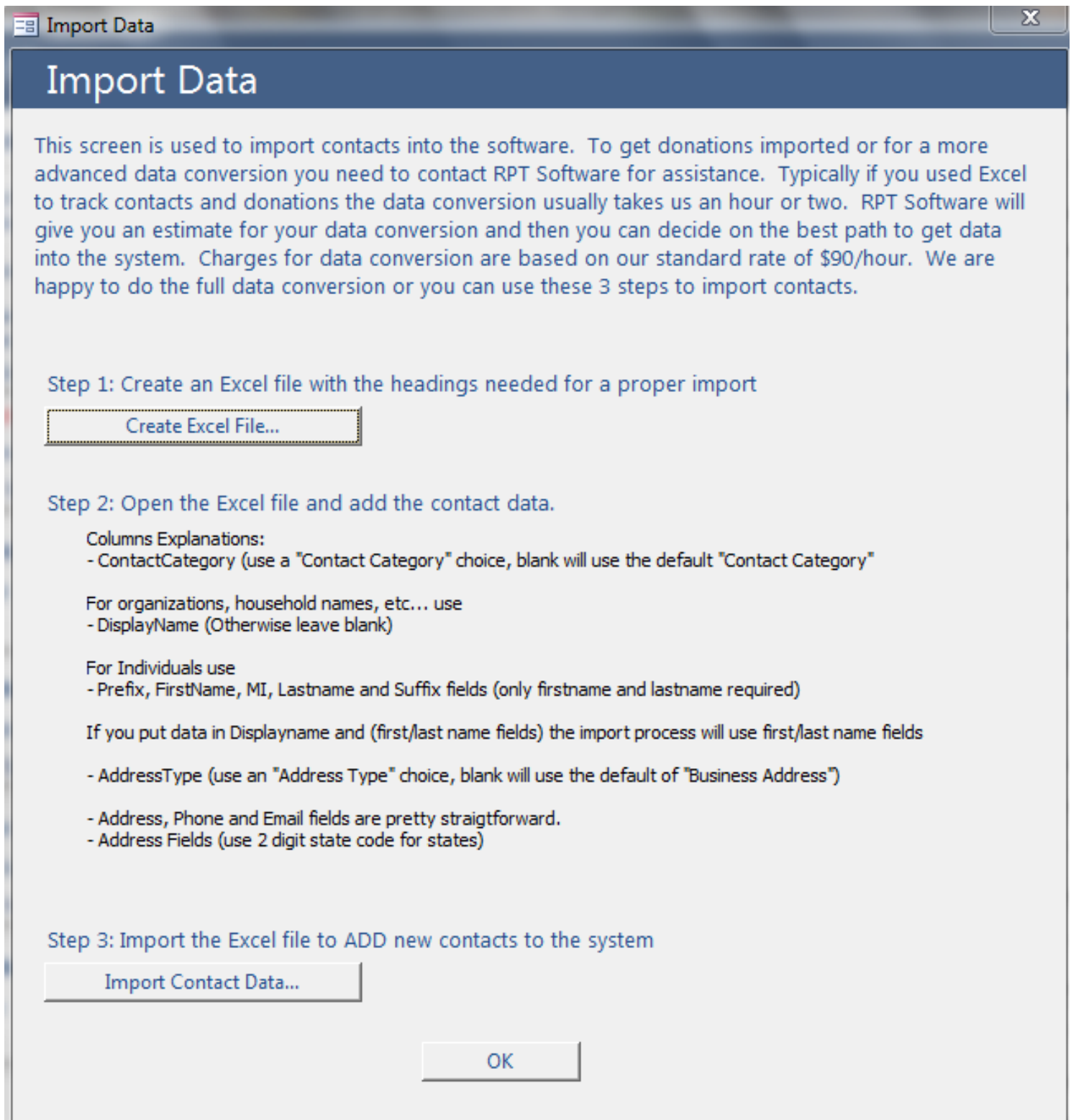
The Hide/Show Areas is used to hide certain parts of the software in which you do not use. For example some non-profits might only be using a portion of the CRM features (such as opportunity management or invoicing). Others might not be tracking events etc....

Just check the areas you want to see and un check the areas you do not want to see.

To change the software to what the *Standard* version allows just check all items except (Opportunities, Invoices, Email and Letters). When using the evaluation this is a good way to tell if you want to purchase the *Standard* version or the *Professional* version.

*This feature is only available in the **Professional Version** of the software.*

Import Data



Import Data

This screen is used to import contacts into the software. To get donations imported or for a more advanced data conversion you need to contact RPT Software for assistance. Typically if you used Excel to track contacts and donations the data conversion usually takes us an hour or two. RPT Software will give you an estimate for your data conversion and then you can decide on the best path to get data into the system. Charges for data conversion are based on our standard rate of \$90/hour. We are happy to do the full data conversion or you can use these 3 steps to import contacts.

Step 1: Create an Excel file with the headings needed for a proper import

Create Excel File...

Step 2: Open the Excel file and add the contact data.

Columns Explanations:

- ContactCategory (use a "Contact Category" choice, blank will use the default "Contact Category")

For organizations, household names, etc... use

- DisplayName (Otherwise leave blank)

For Individuals use

- Prefix, FirstName, MI, Lastname and Suffix fields (only firstname and lastname required)

If you put data in Displayname and (first/last name fields) the import process will use first/last name fields

- AddressType (use an "Address Type" choice, blank will use the default of "Business Address")
- Address, Phone and Email fields are pretty straightforward.
- Address Fields (use 2 digit state code for states)

Step 3: Import the Excel file to ADD new contacts to the system

Import Contact Data...

OK

This screen is used to import contact data into the database.

Step 1: click the button to make an excel file (with proper headings used for import)

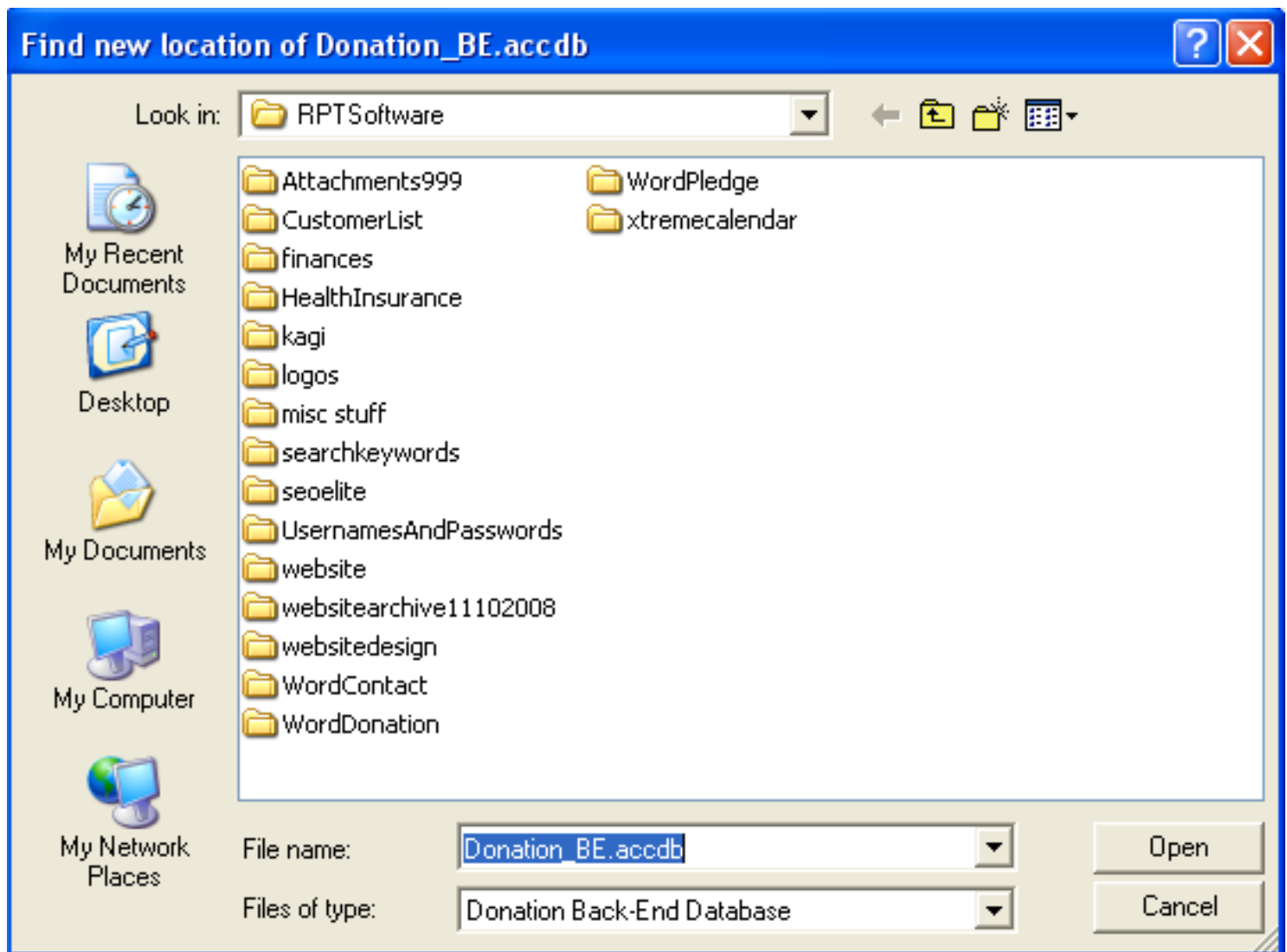
Step 2: you use the excel file to add data

Step 3: click a button and it reads the new contacts from the excel file and adds them to the database.

Networking/Multi User Setup

Using software on a LAN (multi users)

At software start up it looks for the back-end database with all your data



Using our software on a local area network (LAN):

To use our software on a network is very easy. First you need to make sure you have purchased an *Unlimited users* version of the software. Then you just need to do the following process:

1 - Install the evaluation and register the *Unlimited users* version of the software

2 - Close the software

3 - Move the back-end database file to a shared network drive

Example: By default when you installed the software you will see a file called "Donation_BE.accdb" in the "C:\RPTSoftware\" directory. You need to use windows explorer to move this one file to a new location that is shared by all the users you are going to have (example: You move the file to the shared H: drive).

4 - Start the software

At start up the software, since you moved the back-end database the software will not be able to find the database and will display a screen for you to locate the back-end database. Simply change the location to the shared network drive you placed the database, select the file and click *Open*. The software will now remember that it should always use this back-end database.

At this point you have ONE user using the software, with the database in the right location. For each additional user do the following steps:

- Install the software
- Enter the correct registration code
- Close the software
- DELETE the file "Donation_BE.accdb" found in the installation directory (usually C:\RPTSoftware\).
- Start the software
- The software should prompt for the new location of the back-end database, choose the file on the shared network drive and click *Open*

Feel free to contact RPT Software for help in setting up your software so it works with multiple people on your network.

If you need to use the software across a wide area network (WAN) please contact RPT Software for details.

Using software on a WAN (wide area network with users geographically seperated)

To use our software on a WAN or any situation where you have users not just at the office where they are on the office network please contact RPT Software for details. Our software is a typical Microsoft Access 2007 database with a front-end applicationa dn a back-end database and there are technicques to use for these situations.